Desktop Integration Suite User Guide
10*g* Release 3 (10.1.3.3.1)

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Contributing Authors: Ron van de Crommert

Table of Contents

Chapter 1: Introduction

Chapter 2: Managing Content With Content Server Folders

Appendix A: Third Party Licenses

Glossary

Index

Chapter

1

INTRODUCTION

OVERVIEW

This section covers the following topics:

ABOUT DESKTOP INTEGRATION SUITE

Desktop Integration Suite provides a set of embedded applications that help you seamlessly integrate your desktop experience with Content Server. More specifically, it provides convenient access to the content server from Microsoft Windows Explorer, desktop applications like Microsoft Word and Excel, and e-mail clients like Microsoft Outlook and Lotus Notes.

As a result, you can easily manage files in the content server and share files with users directly from your desktop instead of logging onto the content server and using a web browser.

About This Guide

This guide is built up as follows:

- ❖ Chapter 2 — Managing Content With Content Server Folders
- ❖ Chapter 3 — Managing Content Through the Common Dialogs Interface
- ❖ Chapter 4 — Managing Content Through Your E-Mail Client

What's New

New Features and Enhancements in Release 10gR3

Desktop Integration Suite 10*g*R3 has the following new features and enhancements (compared to version 7.7):

- ❖ This version of Desktop Integration Suite fully supports Content Server 10*g*R3.
- ❖ This version of Desktop Integration Suite comes with an MSI installer, which enables system administrators to push out the Desktop client software to multiple workstations. See Appendix A of the *Desktop Integration Suite Installation Guide* for more information on using the MSI installer.

Updates in Release 10g Release 3 (10.1.3.3.1)

Desktop Integration Suite 10*g* Release 3 (10.1.3.3.1) contains the following updates (compared to release 10.1.3.3.0):

- ❖ This version of Desktop Integration Suite now supports Windows Vista.

Chapter

2

MANAGING CONTENT WITH CONTENT SERVER FOLDERS

OVERVIEW

The integration between Microsoft Windows Explorer, e-mail clients Microsoft Outlook or Lotus Notes with Content Server allows you to easily manage server content using the applications you know best, and you don't have to log onto the content server with a web browser. You work with the content server using the Content Server Folders feature.

This section describes the content server tasks a contributor performs using folders, including the following:

For instructions on configuring Content Server for Windows Explorer or e-mail client integration, see the *Desktop Integration Suite Installation Guide*.

Note: Depending on your exact Windows operating system (2000, XP, or Vista), the screenshots in this guide may look slightly different from what you are seeing on your computer.

FOLDERS TERMS AND CONCEPTS

Before you contribute to Content Server, you should become familiar with the following terms and concepts:

- Content Server Folders (page 2-2)
- File Names (page 2-3)
- Metadata (page 2-3)
- Folder Inheritance (page 2-4)
- Security (page 2-5)

These concepts, explained in the following sections, help you understand how Windows Explorer and e-mail clients that interact with the content server.

Content Server Folders

When you integrate Windows Explorer and e-mail clients Microsoft Outlook or Lotus Notes with Content Server, a top-level Folders directory appears in the folder hierarchy. The Content Server Folders feature provides a direct interface to the content server as an alternative to using a web browser.

With Folders, you can continue to work with supported applications such as Microsoft Word or Excel to edit and otherwise manage content that you have checked out of the content server.

The Content Server Folders features enable you to manage content on the server using custom popup menus, while taking advantage of standard Windows drag-and-drop and copy-and-paste functionality.

Note: There is no access to administrative functions through the Content Server Folders features. All administrative functions, which are available through the Folders component, are performed through the content server web browser interface.

File Names

In Content Server, it is acceptable for multiple content items to have the same original file name. However, in the integration of Content Server with Windows Explorer or an e-mail client, file names need to be unique. Because of this requirement, when you add content to a folder that already contains a content item with the same name, the content is checked in as a new revision to the existing content item.

For example, if *process.doc* is in a folder and you add a second *process.doc* file to the folder, the second file becomes a new revision of the first file. If *process.doc* is in a folder and you add *process.xls* to the folder, they remain separate content items because they have different extensions.

The file name that displays in the Name column in Windows Explorer or an e-mail client and in the Name field of the Content Properties dialog box is the same as the original file name in the content server repository. When you rename content through the Windows Explorer integration, the original file name also changes to reflect the new name.

If the automatic content ID generation option is enabled in Content Server, the content IDs follow the established numbering convention. If the option is not enabled, checking in a new content item through Windows Explorer or an e-mail client will generate a unique sequential content ID number or MSG ID.

Metadata

Each folder and content item that is displayed in the Folders hierarchy contains metadata associated with the content server.

Whenever you check a file into Content Server, default metadata values are automatically assigned to the content. These default values, which are set by the system administrator through the Content Server web interface, are evaluated in the following order:

1. **Folder**: When you add content to a folder, the content inherits any default metadata values for the folder that have been set through the Content Server web browser interface.
2. **User**: For any metadata defaults not set for the folder, the user’s default metadata values are applied.
3. **System**: The system default values are applied to any fields that are not set by either the folder metadata or the user’s default metadata.
4. **EmailMetadata**: If the EmailMetadata component is installed, e-mail specific default metadata is assigned to the content.

After you check content into the content server through the Content Server Folders feature, you can change the metadata for the content on the Content Information page (see Viewing the Content Information Page on page 2-15).

Caution: If you change Security Group, Doc Type or Accounts metadata, you will change the URL of the content in the content server.

If you leave the Title field blank, the file name will be used as the title.

A metadata field can be blank as long as it is not required. If a required field is left blank, an error will occur and the content item will not be checked in.

If you change metadata for a folder, the new metadata is applied to content you add to the folder after the change. The metadata of the content that is in the folder prior to the change remains the same.

Metadata Propagation

When you create a new folder, the metadata from the parent folder will populate the fields for the new folder. This allows the folder to initially “inherit” metadata, but allows you to make changes to the new folder.

Subsequent changes to a parent folder’s metadata do not affect the metadata for existing subfolders. If you want to apply a parent folder’s metadata to subfolders and content items, you can use the metadata propagation function. See the *Folders and WebDAV Administration Guide* for more information on metadata propagation.

Folder Inheritance

When you create a new folder, the metadata from the parent folder will populate the fields for the new folder. This allows the folder to initially “inherit” metadata, but allows you to make changes to the new folder. Subsequent changes to a parent folder’s metadata do not affect the metadata for existing subfolders.

The content server administrator can use the metadata propagation function to apply a parent folder’s metadata to subfolders and content items.

Security

The following security controls apply to the Content Server Folders functionality:

- Users can see only the folders that are assigned no security group, or a security group for which they have Read (R) permission.
- Each folder has an owner, which is a user who has permission to manage the folder. The owner can change a folder's metadata and delete the folder, even if they do not have Write (W) or Delete (D) permission to the folder's security group. However, the owner does not have additional permissions to content items within the folder.
- To change a folder's default metadata, you must have Delete (D) permission to the folder or you must be the owner of the folder.
- To delete a folder, you must have delete permission to the folder or you must be the owner of the folder. You must also have permission to delete all of the content items and subfolders in that folder.

If you interact with collaboration projects through the Content Server Folders features, then the Project folders you use have different features for document and project-level security. See the *Collaboration Manager Administration Guide* for more information regarding projects.

For more information regarding content item security, see the *Folders and WebDAV Administration Guide*.

CONTENT SERVER FOLDERS OVERVIEW

You work with content managed by the Content Server Folders feature in much the same way you do with other folders and files in a file system. However, tasks typically performed on files in the local file system may have a different effect when performed on files in folders managed by Content Server. For example, opening a file also checks the content item out of the content server.

The user logins and security controls in Content Server and the Content Server Folders feature also apply to content that is managed through Folders. For example, if you have Read (R) permission for a content item, you will be able to open a copy of the native file, but you will not be able to check in a revision to the file.

Caution: Be careful when changing the security group of a folder. If you change a folder to a more restrictive security group, authors may no longer have permission to manage their own content items. See Security (page 2-5) for further information and the *Folders and WebDAV Administration Guide*.

Accessing the Content Server Folders feature differs depending on the integration you are using.

- Accessing Folders Through Windows Explorer (page 2-6)
- Accessing Folders Through Microsoft Outlook (page 2-7)
- Accessing Folders Through Lotus Notes Mail (page 2-7)
- The Folders Directory Structure (page 2-8)

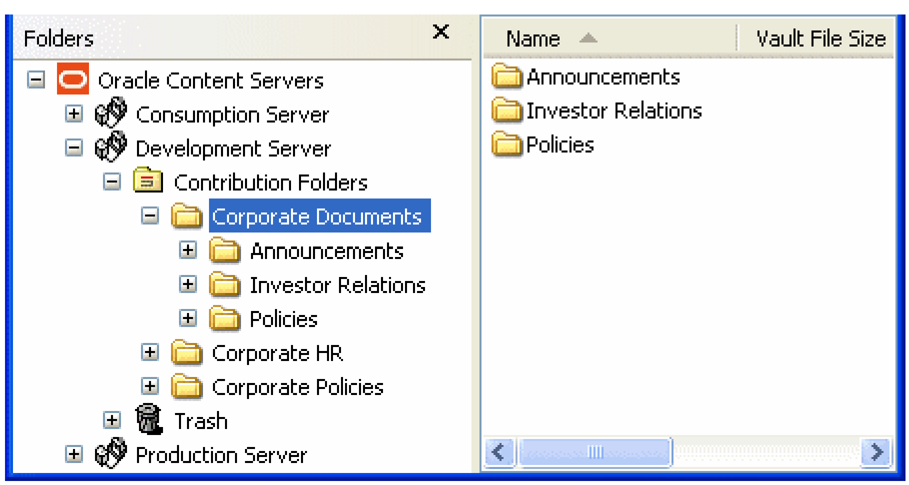
Accessing Folders Through Windows Explorer

When you integrate Windows Explorer with Content Server, the top-level Folders directory is added to the Windows Explorer hierarchy, providing an interface through which you can connect to and manage content servers.

You can access the Content Server Folders feature using any of the following methods:

- Double-click the Folders icon () that displays on your desktop.
- Navigate to the top-level Folders directory in Windows Explorer.
- Double-click a shortcut to a particular server, folder, or content item. See Working With Shortcuts (page 2-38) for more information.

Figure 2-1 Folders interface in Windows Explorer



Accessing Folders Through Microsoft Outlook

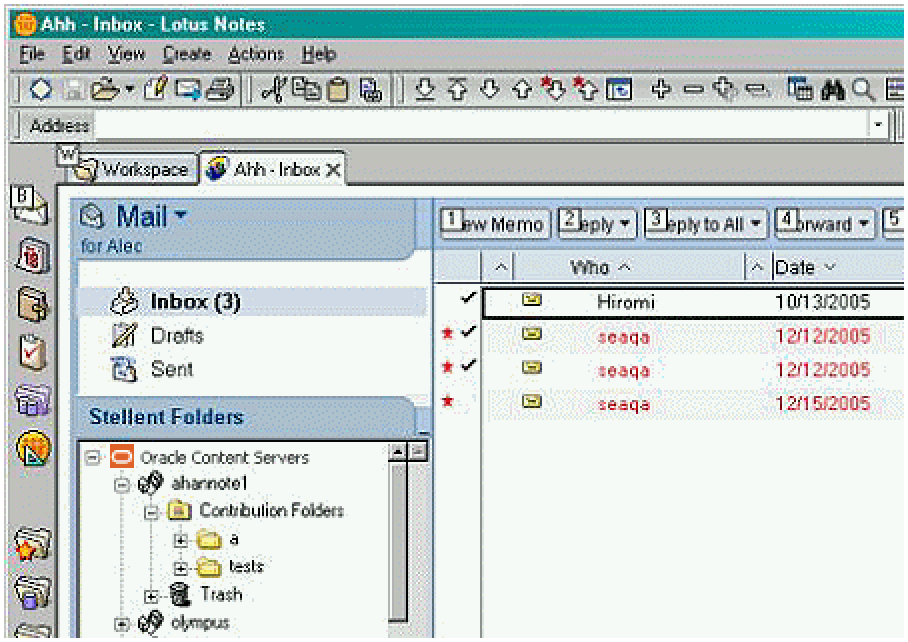
When you integrate Microsoft Outlook with Content Server, the top-level Folders directory is added to Outlook, providing an interface through which you can connect to and manage content servers. You can access the Content Server Folders feature through the folder list in Microsoft Outlook.

Figure 2-2 Folders interface in Microsoft Outlook

Accessing Folders Through Lotus Notes Mail

When you integrate Lotus Notes Mail with Content Server, the top-level Folders directory is added to Lotus Notes, providing an interface through which you can connect to and manage content servers. You can access the Content Server Folders feature through the folder list in Lotus Notes Mail.

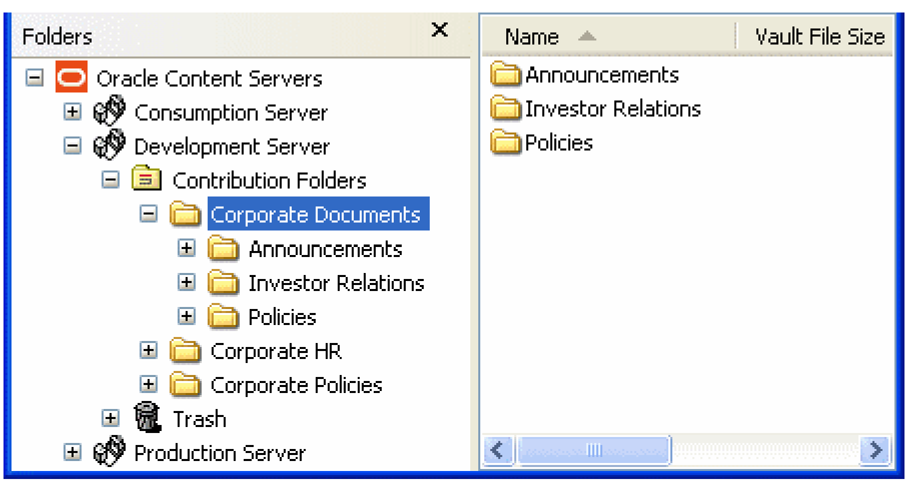
Figure 2-3 Folders interface in Lotus Notes Mail



The Folders Directory Structure

When you integrate Windows Explorer or your e-mail client (Microsoft Outlook or Lotus Notes) with Content Server, you view and interact with the content server through the Content Server Folders hierarchy. You can create a multi-level folder structure with folders.

Figure 2-4 Folders directory structure



This illustration shows the following:

- ❖ The top-level Folders directory ("Oracle Content Servers").
- ❖ Content Server connections that have been added through Folders. (In the example above, there are three servers: Consumption Server, Development Server, and Production Server.)
- ❖ The contents of the Corporate Documents folder, which is under Contribution Folders in Development Server.

OVERVIEW OF FOLDERS MENU OPTIONS

The following sections describe the options available through the popup menus that display when you right-click the servers, folders, and content items in the Folders hierarchy (see Content Server Folders Overview on page 2-5). For instructions on performing specific tasks using these menu options, see Working With Content (page 2-27).

Depending on where you are and what you right-click on in the Folders hierarchy, the following menu options are available:

- ❖ Top-Level Folder Options (page 2-9)
- ❖ Server Options (page 2-11)
- ❖ Folder Options (page 2-12)
- ❖ Folder Options When Nothing is Selected (page 2-13)
- ❖ Content Options (page 2-14)

The popup menus may differ from the examples shown in the following sections, depending on how your system is set up.

Top-Level Folder Options

Depending on how you access the Content Server Folders functionality (using Windows Explorer or your e-mail client), you see a different right-click menu:

- ❖ In Windows Explorer (page 2-10)
- ❖ In Your E-Mail Client (page 2-10)

In Windows Explorer

When you right-click the top-level folder in Windows Explorer, a popup menu appears.

Figure 2-5 Windows Explorer popup menu

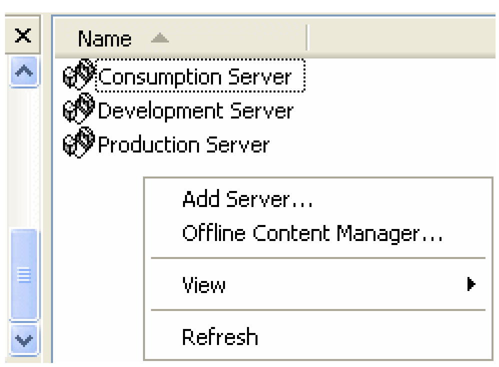
The following options are available from this menu:

- **Explore**—Opens the selection in a two-pane window.
- **Open**—Opens the selection in a single-pane window.
- **Add Server**—Opens the Add Server dialog box so you can add a server connection to your Windows Explorer desktop. See Working With Servers (page 2-17).
- **Offline Content Manager**—Opens the Offline Content Manager dialog box, which you can use to manage all of your syndicated and checked-out content.

In Your E-Mail Client

When you right-click the top-level folder in Microsoft Outlook or Lotus Notes, a popup menu appears.

Figure 2-6 E-mail client popup menu



To access the popup menu, you must navigate to the top-level folder in the hierarchy and then right-click in the right window pane with nothing selected. The top-level folder menu is not accessible through the folder list.

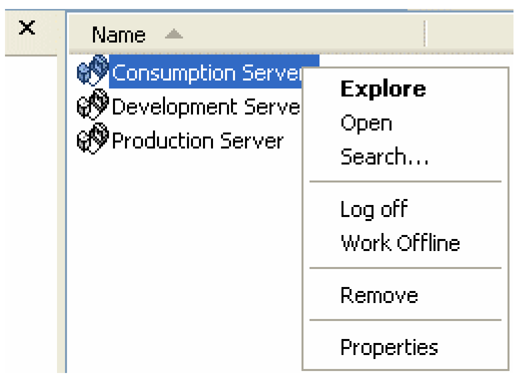
The following options are available from the top-level folder popup menu:

- **Add Server**—Opens the Add Server dialog box so you can add a server connection to your Windows Explorer desktop. See Working With Servers (page 2-17).
- **Offline Content Manager**—Opens the Offline Content Manager dialog box, which you can use to manage all of your syndicated and checked-out content. See Managing Content Available for Offline Use (page 2-41).
- **View**—Changes how the servers are displayed.
- **Refresh**—Updates the window with current content server information.

Server Options

When you right-click a server from Windows Explorer or the content pane of Microsoft Outlook or Lotus Notes, a popup menu appears.

Figure 2-7 Microsoft Outlook/Lotus Notes popup menu



The popup menu offers the following options:

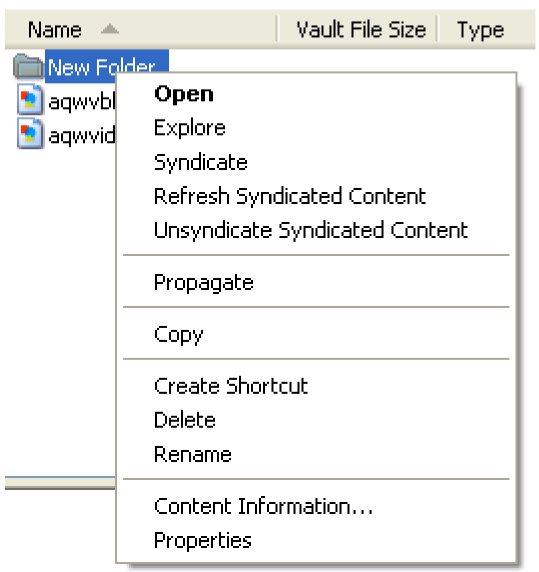
- **Explore**—Opens the selection in a two-pane window.
- **Open**—Opens the selection in a single-pane window.
- **Search**—Searches the content server. See Searching a Content Server (page 2-21).
- **Log off**—Logs you off of the server under Oracle Folders. See Logging Off a Content Server (page 2-22).
- **Work Offline**—Disconnects you from the content server. This is used with syndication, which you can use to access a read-only copy of content when you select the Work Offline option. See About Syndication (page 2-39) and Working Offline (page 2-44).

- **Remove**—Removes the server connection from your Windows Explorer desktop. See Working With Servers (page 2-17) and Removing a Server Connection (page 2-23).
- **Properties**—Displays the server name and URL. See Viewing Server Properties (page 2-21).

Folder Options

When you right-click a folder in one of the servers configured for Oracle Folders, the following popup menu appears:

Figure 2-8 Oracle Folders popup menu



The following options are available from this menu:

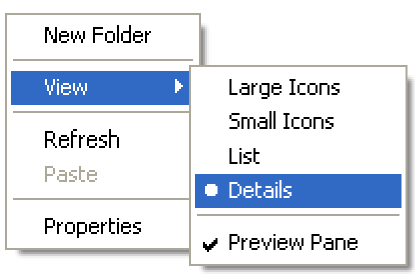
- **Open**—Opens the folder in a single-pane window.
- **Explore**—Opens the selection in a two-pane window.
- **Syndicate**—Marks a folder for syndication. See Marking Content for Syndication (page 2-39).
- **Refresh syndicated content**—Refreshes the syndicated folder, so that any changes are reflected in the folder hierarchy when offline. See Downloading the Most Recent Revision of Syndicated Content (page 2-40).

- **Unsyndicate syndicated content**—Removes the folder from syndication. When you unsyndicate a folder, only the folder is unsyndicated. See Managing Content Available for Offline Use (page 2-41)
- **Propagate**—Propagates metadata. This is set up in the content server web browser interface. See Content Server Help for instructions on metadata propagation.
- **Copy**—Copies the folder. See Copying and Pasting a Folder (page 2-24)
- **Paste**—Pastes information into the folder. See Copying and Pasting a Folder (page 2-24).
- **Create Shortcut**—Creates a shortcut to the folder on the desktop. See Working With Shortcuts (page 2-38).
- **Delete**—Deletes the folder and its content from the content server. See Deleting a Folder (page 2-26).
- **Rename**—Renames the folder. See Renaming a Folder (page 2-25).
- **Content Information**—Opens the content information page in the content server for the content item. See Viewing the Content Information Page (page 2-15).
- **Properties**—Displays folder properties. See Viewing Server Properties (page 2-21).

Folder Options When Nothing is Selected

When you right-click in the right pane of Windows Explorer or your e-mail client (Microsoft Outlook or Lotus Notes) with a folder selected in the left pane, a popup menu displays.

Figure 2-9 Unselected folder option popup menu



The following options are available from this menu:

- **New Folder** or **New Project**—Creates a new folder or a new project.

- ❖ **View**—Changes how the folders are displayed and includes the following options:
  - **Large Icons** – Displays content items as large icons.
  - **Small Icons** – Displays content items as small icons.
  - **List** – Displays content items as a list.
  - **Details –** Displays content items in a detailed view.
  - **Preview Pane** – When checked, displays the preview pane. See Viewing the Content Information Page (page 2-15).
- ❖ **Refresh**—Updates the window with current content server information.
- ❖ **Paste**—Pastes information into the folder. See Copying and Pasting a Folder (page 2-24).
- ❖ **Properties**—Displays server or folder properties, depending on what you selected in the left-hand pane. See Viewing Server Properties (page 2-21) or Viewing Folder Properties (page 2-26).

Content Options

When you right-click a content item in a folder in the folder hierarchy, a popup menu appears.

Figure 2-10 Content options popup menu

The following options are available from this menu:

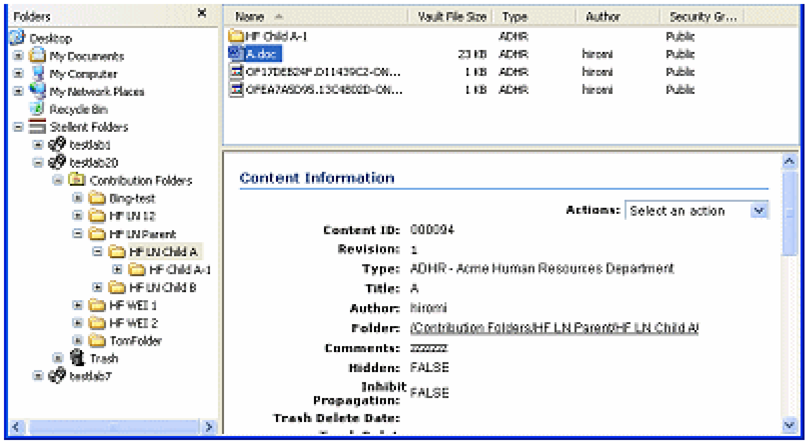
- ❖ **View**—Opens a read-only copy of a content item in its associated application. This is the same as double-clicking a content item. See Viewing Content (page 2-34).
- ❖ **Open**—Checks the content item out of the content server and opens it in its associated application. (When you finish editing the content, you will check it back into the content server using the “Check In” option.) See Checking Out Content (page 2-28).

- **Check Out**—Checks out content to a location outside of a content server. See Checking Out Content (page 2-28).
- **Check In**—Checks content back into the content server after you checked it out using the “Open” or “Check Out” option. See Checking In Content (page 2-27).
- **Undo Check Out** – Cancels the latest checkout performed on a file. Available only when a file is checked out of the content server. See Checking Out Content (page 2-28).
- **Syndicate**—Marks a content item for syndication. See Marking Content for Syndication (page 2-39).
- **Copy**—Copies the content. You can then use the Paste command to place the copy in another folder. Copying and Pasting Content (page 2-29).
- **Create Shortcut**—Creates a shortcut to the content on the desktop. See Working With Shortcuts (page 2-38).
- **Delete**—Deletes the content from the content server. See Deleting Content (page 2-34).
- **Rename**—Opens a text box for the current name that allows you to rename the content item. See Renaming Content (page 2-32).
- **Content Information**—Opens the Content Information page in the content server for the content item. See Viewing the Content Information Page (page 2-15).
- **Properties**—Displays content item information, such as the name and URL. See Viewing Content Properties (page 2-31).

Viewing the Content Information Page

You can view the content information page for a managed content item directly from Windows Explorer or your e-mail client. The content information page displays in the preview pane when a content item is selected.

Figure 2-11 Preview pane



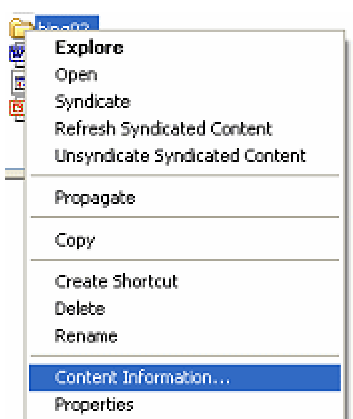
You can view the metadata assigned to the content item, check the content item out of the content server, and perform any task that you normally would in the content server—directly from this pane.

To enable or disable the content information preview pane, right-click in the contents pane, choose **View** and select **Preview Pane** (see Folder Options When Nothing is Selected on page 2-13).

The preview pane will remain enabled (or disabled) for this particular server connection, which includes every folder in it. If you open a folder from a different server connection, you will only see the preview pane if it was enabled there.

You can also open the content information page in a separate window by right-clicking the content item or folder and choosing **Content Information** in the popup menu.

Figure 2-12 Content information popup menu



You can access Content Server Help from the Content Information page for more information, just as you could if you opened the page from the web browser interface.

Working With Servers

When you first integrate Content Server with Windows Explorer or your e-mail client (Microsoft Outlook or Lotus Notes), only the top-level folder directory appears. As you add server connections, those servers are listed under this top-level folder and you can begin working with them based on your permissions.

Figure 2-13 Folder hierarchy

You can add or remove a server connection from the folder hierarchy, and you can also change the server name that displays in the hierarchy.

If you add or remove a server connection, or change the name that displays, it only affects the view from Windows Explorer or your e-mail client on your desktop. The server settings are stored on your computer.

This section covers the following topics:

- Adding a Content Server Connection (page 2-18)
- Connecting to a Content Server (page 2-19)
- Logging Onto the Content Server (page 2-20)
- Viewing Server Properties (page 2-21)
- Searching a Content Server (page 2-21)
- Logging Off a Content Server (page 2-22)
- Removing a Server Connection (page 2-23)

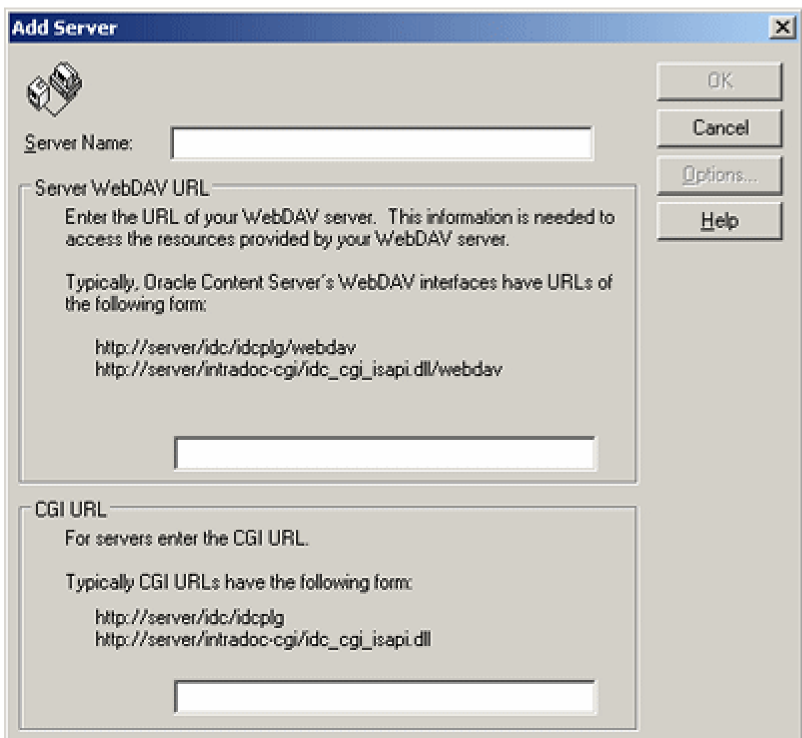
Adding a Content Server Connection

Follow these steps to add a server connection to the folder hierarchy:

1. Select the top-level folder in the Content Server Folders hierarchy in Microsoft Windows Explorer or your e-mail client.
2. Right-click and select **Add Server** on the popup menu.

   The Add Server dialog box is displayed.

Figure 2-14 Add Server dialog



3. In the **Server Name** text box, enter the name you would like to display for the server under the top-level folder in Windows Explorer or your e-mail client.
4. In the text box under **Server WebDAV URL**, enter the web server URL.

   A URL is automatically inserted using the name you specified in the Server Name text box. You can also copy and paste one of the sample URLs provided.
5. In the text box under **CGI URL**, enter the CGI URL.

Note: A URL is automatically inserted using the name you specified in the Server Name text box. You can also copy and paste one of the sample URLs provided.

6. Click **OK**.

The new server connection will appear in all of the applications you use to interact with the content server (Windows Explorer, e-mail clients, and other integrated applications).

Connecting to a Content Server

You can access and manage content server connections through the Content Server Folders hierarchy. Once you click a content server that you are connected to through the Folders hierarchy, and log on to that server, you can view and interact with the folders and content in the server, based on your content server permissions, while still in Windows Explorer or your e-mail client.

Figure 2-15 Connection in Windows Explorer

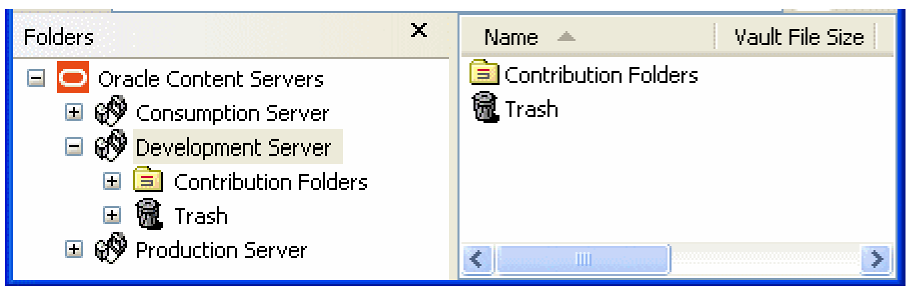


Figure 2-16 Connection from Microsoft Outlook

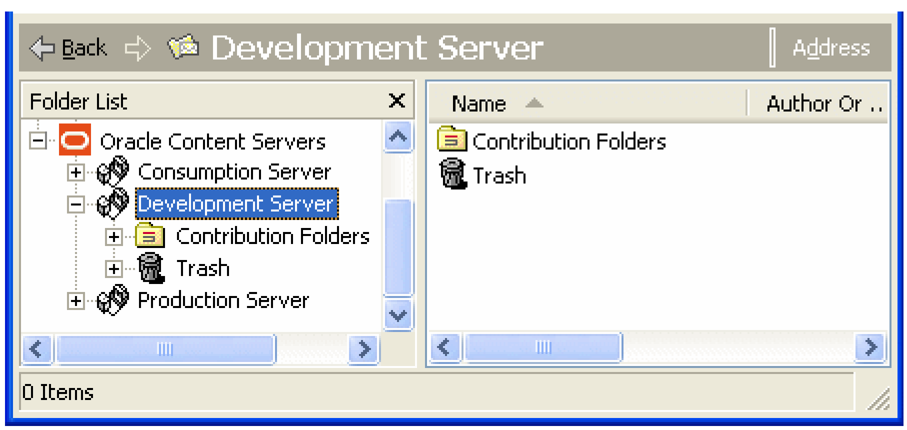
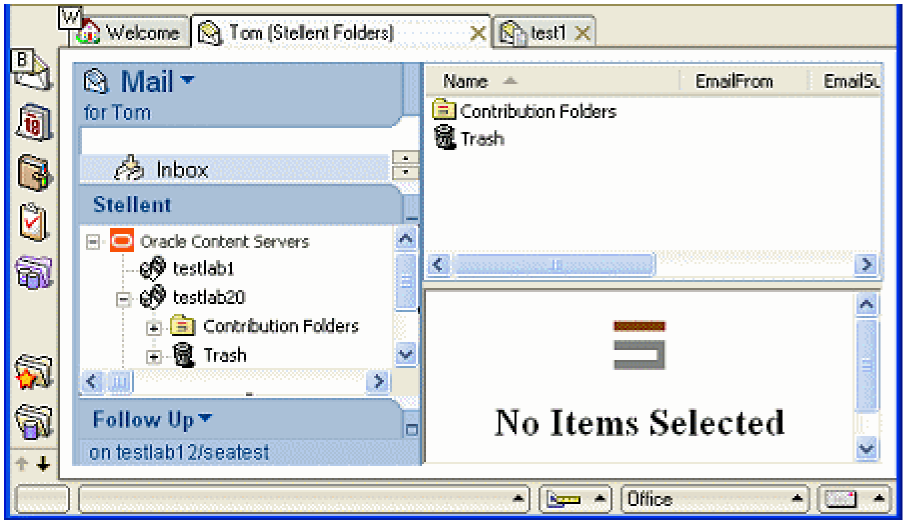


Figure 2-17 Connection from Lotus Notes



You may view a different number of folders for each server, depending on how each server you are connected to is set up. You may also view additional folders, such as a Project folder, if Collaboration Manager is enabled on the content server.

When working on a content server, the Address field displays your location.

Logging Onto the Content Server

In order to access the content server from Windows Explorer or your e-mail client, you will be prompted to log onto the server. The login screen that you see depends on the server authentication that has been set up by your site administrator.

You see either the Content Server login or the Netegrity SiteMinder login.

Figure 2-18 Content Server Login

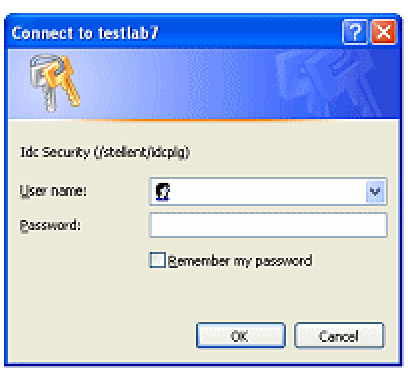
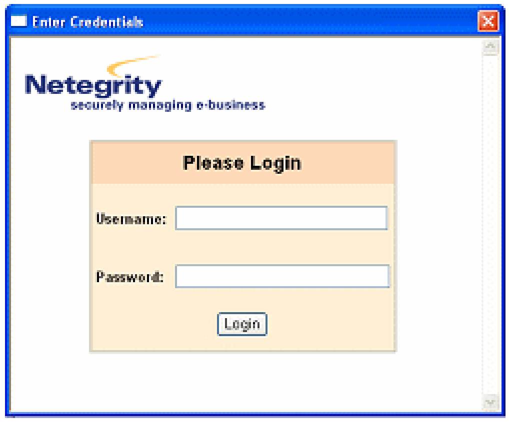


Figure 2-19 Netegrity SiteMinder Login



Once you enter your login credentials, you will be able to view and interact with the content on the content server.

For information on configuring Netegrity SiteMinder support in Desktop, see the *Desktop Integration Suite Installation Guide*.

Viewing Server Properties

You can view the URL and display name of any server in the Content Server Folders hierarchy. Each content server has a unique URL that cannot be changed, but you can change the display name at any time. To view the properties of a server in the folder hierarchy, right-click the server and click **Properties** in the popup menu.

Follow these steps to view the properties of a server:

1. Right-click the server you want to rename, and click **Properties** in the popup menu.

   The Server Properties dialog is displayed.

2. Under Name, type the new name.
3. Click **OK**.

Searching a Content Server

You can search a content server directly from the Content Server folder hierarchy in Windows Explorer or your e-mail client. The search results are displayed within a Search Results folder, so you can conveniently access the search results from your desktop without having to open the content server web browser interface.

You can interact with content items that display in the Search Results folder just as you could any other content item in the content server. For example, you can conveniently view, check in, and check out a content item in the folder. You can also view the content information page and make changes to the assigned metadata, if necessary.

Because the content that is in a Search Results folder is the actual content, you may see the content display in two places, such as in a Contribution Folder and in the Search Results folder.

Caution: If you delete a content item from the Search Results folder, you are removing the actual content item from the content server.

Follow these steps to search the content server:

1. Right-click the server or project you wish to search.
2. Click **Search** from the popup menu.
3. Enter the search criteria on the Content Query Capture page and click **Search**.

   The results are displayed in a special Search Results folder, which is represented by the Search icon ( ) in Oracle Folders.

By default, search results only include content items contained within folders. The system administrator can configure the content server to search all content items, regardless of whether they are in folders, so that all content items in the content server are included when you search from the server level.

You can view one set of search results at a time, for each server you are connected to through the Content Server Folders functionality. The last search you entered while you were in that explorer session display. When you close that session by closing the window, the search results folder is cleared.

Logging Off a Content Server

When you are finished interacting with a content server, you may wish to log off of the server. To do so, follow these steps in Windows Explorer or your e-mail client.

- Under the Content Server folder hierarchy, right-click the server you want to log off from.
- Click **Log off** on the popup menu.

To log on to a server after you logged off, click the server in the Folders hierarchy. When you are prompted to log on, enter your user name and password. If you are using NTLM security, your user name and password are automatically supplied when you click the server, so you may not be prompted for log on information.

Removing a Server Connection

Perform the following steps in Windows Explorer or your e-mail client to remove a server connection:

1. Under the Content Server folder hierarchy, select the server for which you want to remove the connection.
2. Right-click and select **Remove** on the popup menu.
3. Click **OK** on the confirmation dialog that displays. The server no longer displays in Windows Explorer on your computer. (Click **Cancel** to retain the server connection.)

This removes the server connection from all of the applications you use to interact with the content server (Windows Explorer, e-mail clients, and other integrated applications).

Working With Folders

When you create a new folder in the Content Server folder hierarchy, each person who has the rights to view that folder will see the folder. The content you add to the folder will also be available to each person on that server, again according to their security permissions.

This section covers the following topics:

Adding a Folder

When you add a new folder, default metadata is assigned to it. You can change the default metadata for the folder while adding the new folder, or any time after you add it if you wish. When you add content to a folder, the content inherits default metadata from the folder (see Metadata on page 2-3 for more information).

Follow these steps to add a new folder:

1. Open Windows Explorer or your e-mail client so that both the left and the right-hand panes display.
2. Open the top-level folder in the Content Server folder hierarchy. The content servers will display under this folder.
3. Click the server where you want to create a folder, and log in, if prompted, by entering your username and password.
4. Browse to the location in the hierarchy where you want to add the folder.
5. In the right-hand pane, right-click in the white space on the screen while nothing is selected. A popup window is displayed.
6. Click **New Folder** (or **New Project** if you are adding a Project folder). A new folder displays, and the folder name is highlighted.
7. Type the name of the folder and press **Enter** on your keyboard.

   If you're using Windows Explorer, the Folder Properties dialog box displays, showing the folder Name and URL. From this dialog box, you can do the following:

   - Enter a new folder or project name in the Name field.
   - View the folder or project URL.
   - Click the **Content Information** button to open the content information page for the folder or project in the content server.
8. You can change the properties of the new folder at any time by right-clicking the folder and choosing **Properties**. This opens the Folder Properties dialog box. When finished making changes, click **OK**.

Important: Before you can add content to your folder, you need to assign metadata to it, in particular the document "Type" and "Security Group.

Copying and Pasting a Folder

You can copy and paste a folder and its contents from one location in the Content Server folder hierarchy to another:

- You can copy and paste a folder and its contents from the file system to a server that is displayed in the Content Server folder hierarchy. When you paste the folder into the server, the folder and its content is checked into the content server.

- You can copy and paste a folder that resides in a server in the Content Server folder hierarchy from one location to another within the same server, or to a different server if you wish. When you copy and paste a folder to a server, the content in the folder that you pasted to another location is checked into the content server as new, separate content with new content IDs, unless content with the same file name and extension already exist in the folder. If content with the same file name and extension already exist in the folder, the duplicate file will be checked into the content server as a new revision to the existing content.
- You can copy and paste a folder from a server in the Content Server folder hierarchy to your file system. The folder (and its contents) you paste on the file system is not checked into the content server.

You may also want to consider adding a shortcut to the top-level folder in the Content Server folder hierarchy on your file system so you can easily access the folder each time you double-click the shortcut.

Follow these steps to copy and paste a folder and its content:

1. Browse to the folder you want to copy. The folder can exist on your local system, or in a server in the Content Server folder hierarchy.
2. Right-click the folder and click **Copy** on the popup menu.
3. Browse to the location where you want to paste the folder. You can paste the folder to your local system or to a server in the Content Server folder hierarchy.
4. Right-click and select **Paste** on the popup menu to add the folder and its contents to the new location.

For information regarding how metadata is assigned to folders and content that are added to the content server, see Metadata (page 2-3).

Renaming a Folder

When you rename a folder in the Content Server folder hierarchy, the new folder name displays server-wide so that everyone who views that folder in the content server will see the new folder name.

Follow these steps to rename a folder:

1. Right-click the folder to rename, and click **Rename** on the popup menu that displays.
2. In the edit box that appears, type the new folder name.
3. Press **Enter** on your keyboard, and the folder is renamed.

Follow these instructions to rename a folder from the Folder Properties dialog box:

1. Right-click the folder you want to rename, and click **Properties** on the popup menu that displays.
2. In the Folder Properties dialog box, under Name, enter the new name.
3. Click **OK**.

Deleting a Folder

We do not recommend deleting a folder. If you delete one, all subfolders and all revisions of all content items in that folder may also be deleted, which might affect everyone who uses that content server.

Important: When you delete a folder or a content item, it may be permanently deleted or moved to a Trash folder, depending on how the system administrator set up your content server. For information on the Trash folder and its effect on folder and content deletion, see the *Folders and WebDAV Administration Guide*.

To delete a content item, you must have Delete (D) permission for the security group of that content item.

To delete a folder, you must be the owner of the folder or have Delete (D) permission for the folder's security group, and you must have Delete (D) permission for the security groups of all subfolders and content items within the folder.

To delete a folder, right-click the folder and click **Delete** on the popup menu. This option is not available for top-level folders, such as "Contribution Folders."

If you have permission to delete, the folder and its contents will be deleted from the content server. If, during the delete process, the system encounters content that you do not have permission to delete, the delete process will end at that item, and the remainder of the content in the folder will be retained.

Viewing Folder Properties

You can view the properties of a folder to change the folder name, view the URL, or to access the content information page in the content server.

If you change the folder name, the name is changed throughout the server, so everyone using that server who views the folder will view the folder by its new name.

Follow these steps to view the properties of a folder:

1. Right-click the folder for which you want to view or change the properties, and click **Properties** on the popup menu.
2. In the Folder Properties dialog box, under Name, leave the name as is or type a new name if you wish.
3. If you would like to access the content information page in the content server web browser interface, such as to view or change metadata, click the **Content Information** button.
4. Click **OK**.

WORKING WITH CONTENT

When you add content to a folder in the Content Server folder hierarchy, the content is checked into the content server and default metadata is applied to the content.

The following topics are discussed:

Checking In Content

You can check content into a content server from the Content Server folder hierarchy in Windows Explorer or your e-mail client by:

❖ Using drag-and-drop

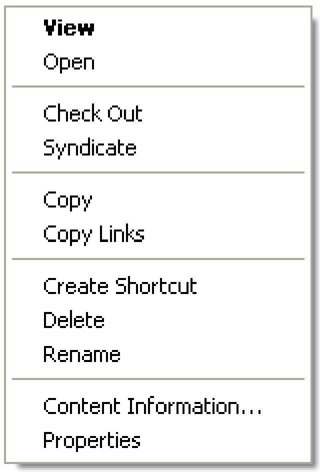
❖ Using the Copy and Paste options in the right-click menu

- In an e-mail client, choosing **Check In Mail Item** (which is available in the toolbar of Outlook and the Actions menu in Lotus Notes).

If an item is currently checked out, you can check it back in by:

- Using the Offline Content Manager (see Managing Content Available for Offline Use on page 2-41).
- Clicking the "Check In" option on the right-click menu.

Figure 2-20 Right-click menu for content



Important: f you add content to a folder that already contains a content item with the same name, the content is checked in as a new revision to the existing content item. See File Names (page 2-3) for more information.

After the content is checked in, the red check mark that displays in Windows Explorer is removed, indicating that the file is checked into the content server. A new revision is created when you check the content into the content server.

Checking Out Content

The following options are available for checking content out of the content server:

- **Open**—Checks out and opens the selected content using its associated application. You must use the Check In option to check the content back into the content server. A new revision is created when you check the content back into the content server.
- **Check Out**—Checks out the content to your local desktop. The content must be opened with its associated application. You must check the content back into the

content server using the Check In option when you finish editing the content. A new revision is created when you check the content back into the content server.

- **Undo Check Out**—Cancels the last checkout. This option is available when a content item is checked out of the content server. You may want to use this option if you checked content out of the content server unintentionally, or if you want to cancel your checkout for any reason.

A red check mark in a content item ( ) indicates that the content is currently checked out of the content server.

You may want to use the Offline Content Manager to manage your checked-out files. See Managing Content Available for Offline Use (page 2-41) for more information.

Copying and Pasting Content

Using Windows Explorer and your e-mail client, you can copy and paste content from one location to another:

- You can copy and paste content from the file system to a server in the Content Server folder hierarchy. The content is checked into the content server.
- You can copy and paste content from a server in the Content Server folder hierarchy to your file system. The content you paste to the file system is not checked into the content server.
- You can copy and paste content from one location in the Content Server folder hierarchy to another, either within the same server or between two servers.

  When you copy and paste between servers, the content you paste to the new location is checked into that content server as new, separate content with a new content ID, unless content with the same file name and extension already exist in the folder. In that event, the duplicate file will be checked into the content server as a new revision to the existing content.

You may want to consider adding a shortcut to content so you can easily access the file each time you double-click the shortcut.

Follow these steps to copy and paste content:

1. Browse to the item you want to copy. It can be on your local file system or in the Content Server folder hierarchy.
2. Right-click the item and click **Copy** on the popup menu.

3. Browse to the location where you want to paste the item (this can be on your local file system or in the Content Server folder hierarchy).
4. Right-click and choose **Paste** on the popup menu to add the item to the new location.

You can also use the **Edit > Copy** and **Edit > Paste** command in Windows Explorer to perform this same action. (This is not supported, however, in an e-mail client.)

For information regarding how metadata is assigned to folders and content that are added to the content server, see Metadata (page 2-3).

Copying Links

Using Windows Explorer or your e-mail client, you can copy the link properties of a content item (or multiple content items) and paste that information into an e-mail message, a Word document, or another business document. Link properties are the three links associated with a content item in the content server. They include the web-viewable link, native file link, and content information link.

Typically, you see this information when you open the content information page and choose **Send link by e-mail** in the Actions menu. A new e-mail message displays with the three links in it.

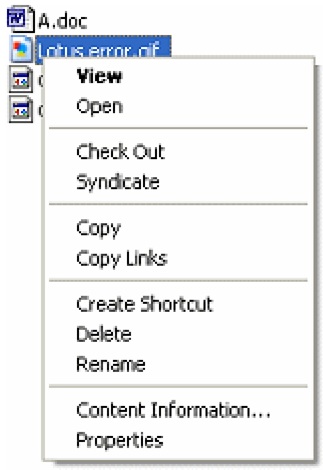
By using “Copy Links” in Windows Explorer or your e-mail client, the same three links are placed in your Windows clipboard so that you can easily paste them into another file. This makes it a lot easier to share content with others without having to open the content information page each time.

Follow these steps to copy links:

1. Browse to the content item (or items) you want to copy links for in the Content Server folder hierarchy.

   To select multiple items, press the Ctrl key (for non-consecutive selections) or Shift key (for consecutive selections) and select the items with your mouse.
2. Right-click the item (or items) and choose **Copy Links** on the popup menu.

Figure 2-21 Popup menu sample



3. Open the file (e-mail message, Word document, etc.) where you want to place this information and paste it there.
4. The three links (web-viewable link, native file link, and content information link) are displayed in your document for each content item.

Viewing Content Properties

You can view content properties to change the name or to view the content URL.

Follow these steps to view the properties of content:

1. Right-click the content item for which you want to view or change the properties, and click **Properties** on the popup menu.

   The Content Properties dialog box opens.
2. Under Name, leave the name as is or type a new name if you wish.
3. If you would like to access the content information page in the content server web browser interface, such as to view or change metadata, click the **Content Information** button.
4. Click **OK**.

Renaming Content

The file name that is displayed in the Name column in Windows Explorer, in your e-mail client, and in the Name field of the Properties dialog box is the same as the original file name in the Content Server repository. When you rename content through the Content Server folder hierarchy, the original file name also changes to reflect the new name.

Follow these steps to rename content:

1. Right-click the content item you want to rename, and click **Rename** on the popup menu.
2. Enter the new name, and press **Enter** on your keyboard.

Follow these steps to rename content from the Content Properties dialog:

1. Right-click the content item you want to rename, and click **Properties** on the popup menu. The Content Properties dialog box opens.
2. Under Name, enter the new name.
3. Click **OK**.

Changing the Column Display

When you view content through the Content Server folder hierarchy, its content server properties display as column headers in the right-hand pane so you can quickly see the metadata that is assigned to the content.

Follow these steps to change the display of columns:

1. Log into the content server for which you want to change the content display.
2. Right-click in the column headings in the right-hand pane, and a Column Settings option is displayed.

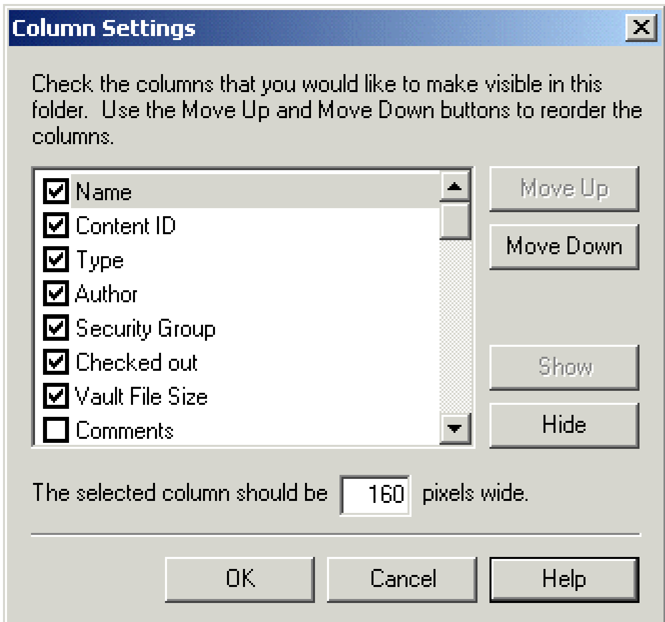
Figure 2-22 Column Settings option

3. Click **Column Settings**.

   The Column Settings dialog box shows all of the available metadata from the content server that you can display as column headers in Windows Explorer or your e-mail client for content in the Content Server folder hierarchy.

If you're working in an e-mail client, you also see e-mail-specific metadata.

Figure 2-23 Column Settings dialog



4. Click a check box to select or clear a metadata you want to display or hide. You can also select the metadata and click **Show** or **Hide** to display or hide the metadata.
5. To resize a column, select the metadata and change the pixel width by entering the width in the "The selected column should be *X* pixels wide" box. You can also resize a column in Windows Explorer by clicking the column and adjusting the width with your mouse.
6. To reorder the columns, click a selected metadata value and click **Move Up** or **Move Down** until it is in the correct location.
7. Click **OK**.

You can also reorder the column display from Windows Explorer. To do so, click the column you want to move, drag it where you want the column to display, and release the click. A thin blue bar displays while you move the column, which indicates where the column will display.

Deleting Content

We do not recommend deleting a folder. If you delete one, all subfolders and all revisions of all content items in that folder may also be deleted, which might affect everyone who uses that content server.

Important: When you delete a folder or a content item, it may be permanently deleted or moved to a Trash folder depending on how the system administrator set up your content server. For information on the Trash folder and its effect on folder and content deletion, see the *Folders and WebDAV Administration Guide*.

- To delete a content item, you must have Delete (D) permission for the security group of that content item.
- To delete a folder, you must be the owner of the folder or have Delete (D) permission for the folder's security group. You must also have Delete (D) permission for the security groups of all subfolders and content items within the folder.

If you have permission to delete, the content will be deleted. If you select multiple content items and during the delete process the system encounters content that you do not have permission to delete, the delete process will end at that item, and the remainder of the content will be retained.

Viewing Content

You can quickly view a read-only copy of a content item right from your desktop in the Content Server folder hierarchy. When you view a content item, it remains checked into the content server and a copy is placed on your computer.

To view a content item, right-click that item and select **View** from the popup menu.

When you double-click a content item in the Content Server folder hierarchy, it opens in View mode.

Copying and Pasting Between Applications

Use the menu copy and paste options (not keyboard commands) when working between Lotus Notes and Windows Explorer. Lotus Notes has an internal clipboard and data from that clipboard will be retained when using keyboard copy and paste.

For example, if you use the keyboard copy and paste (Ctrl+C and Ctrl+V) to copy a Lotus Notes memo to your clipboard, paste it into the Content Server folder hierarchy, then copy a file from Windows Explorer and attempt to paste it into the same Content Server folder, the result is the previous Notes memo.

Attaching Content to an E-Mail Message

You can attach one or more content items to an e-mail message, and those content items can originate from the content server, from your local file system, or from an offline location.

This section describes all three methods:

- Attaching Content From the Content Server (page 2-35)
- Attaching Content From the File System (page 2-37)
- Attaching Content From an Offline Location (page 2-37)

Attaching Content From the Content Server

You can attach one or more content items, or links to those content items, from the content server to an e-mail message you are sending. You can send different versions of the attachment or a link to the attachment.

Follow these steps to attach content from the content server:

1. Open the e-mail client (Microsoft Outlook or Lotus Notes).
2. Create a new e-mail message.
3. Open the Get Attachment dialog box as follows:
   - In Microsoft Outlook, click the **Check In Mail Item** button on the toolbar.
   - In Lotus Notes, click **Actions—Check In Mail Item**.
4. Click the **Server** tab, if this is not already the default view. (You may be prompted to enter your login credentials first.)

   The search page of the content server displays.
5. To change to a different content server, select the server from the **Server** drop-down list.

   If the server you want to use is not listed, click the Server icon () and follow the steps in Adding a Server Connection (page 4-8). You may be prompted again to enter your login credentials.

6. From the **Action** drop-down list, select the attachment option you would like to use (see description below).

Type	Description
Attach native file	Attaches the file in its native format.
Attach native file URL	Attaches the URL to a file in its native format
Attach alternate file	Attaches the alternate file.
Attach alternate file URL	Attaches the URL to the alternate file
Attach weblayout file	Attaches the file in a web-viewable format.
Attach weblayout file URL	Attaches the URL to the file in a web-viewable format
Attach content information page URL	Attaches the URL to the content information page for that file
Attach HTML Rendition	Attaches the HTML rendition of the file

   If you select a native or web-viewable file, the e-mail recipient will receive the current revision of the file at the time you selected it. If you select a URL, the most recent revision that exists in the content server always displays when the e-mail recipient clicks the link.

7. Search the content server for the desired item or items.
8. Click the selection button (Select) next to the item that you want to attach to your message.

   Or, to select a particular revision of the content item, click the **Info** button (i) next to it. On the content information page, select the desired revision.

   To attach multiple content items from the content server, repeat steps 3 through 8 for each item.

9. You will return to the new message window in the e-mail client.

   Author the e-mail message and send it in the usual way.

If you use Microsoft Word as your e-mail editor in Outlook 2000 or 2002, you will not be able to use the E-Mail Client Integration's attachment feature. To use this feature, you need to use Outlook's HTML or text editor.

Attaching Content From the File System

You can attach one or more content items from your local file system to an e-mail message you are sending. You can still attach files using your e-mail client's native file attachment feature.

Follow these steps to attach content from the file system:

1. Open the e-mail client (Microsoft Outlook or Lotus Notes).
2. Create a new e-mail message.
3. Open the Get Attachment dialog box as follows:
   - ❖ In Microsoft Outlook, click the **Get Attachment** button on the toolbar.
   - ❖ In Lotus Notes, place your cursor in the body of the message and then click **Actions—Get Attachment**.
4. Click the **Folders** tab, if this is not already the default view.
5. Use the **Look In** drop-down box to locate the folder that contains the file.
6. Select the file and click **OK**.

   You will return to the new message window in the e-mail client with the file attached.
7. Author the e-mail message and send it in the usual way.

Attaching Content From an Offline Location

You can attach one or more content items from an offline location to an e-mail message you are sending. Offline content includes:

- ❖ New files that you saved but did not check into the content server (when you closed the file)
- ❖ Read-only files that you obtained from the content server for viewing purposes
- ❖ Files checked out of the content server that you are still working on

Follow these steps to attach content from an offline location:

1. Open the e-mail client (Microsoft Outlook or Lotus Notes).
2. Create a new e-mail message.

3. Open the Get Attachment dialog box as follows:
   - In Microsoft Outlook, click the **Get Attachment** button on the toolbar.
   - In Lotus Notes, place your cursor in the body of the message and then click **Actions—Get Attachment**.
4. Click the **Offline Content** tab, if this is not already the default view.
5. Select the file and click **OK**.

   You will return to the new message window in the e-mail client with the file attached.
6. Author the e-mail message and send it in the usual way.

WORKING WITH SHORTCUTS

You can create a shortcut to a folder, content, or a project so you can quickly access information that you use often. When you create a shortcut, the location of the item remains the same, and the shortcut to the item is placed on your desktop.

You can move the shortcut from your desktop to another location if you wish by cutting the shortcut and pasting it in a new location.

When you click a shortcut to a folder or a project, the contents are displayed in a browser window. When you click a shortcut to a content item, the content is checked out of the content server (if it is available and if you have permission to check it out).

To create a shortcut, right-click the item and click **Create Shortcut** on the popup menu. The shortcut is automatically placed on your desktop.

To delete a shortcut, click the shortcut and press the **Delete** key on your keyboard. When you delete a shortcut, only the shortcut is deleted. The item the shortcut references remains intact.

SYNDICATING CONTENT

You may want to view a read-only copy of content that is checked into Content Server while you are disconnected from the server. You can do this by using the syndication feature.

- About Syndication (page 2-39)
- Marking Content for Syndication (page 2-39)

- Downloading the Most Recent Revision of Syndicated Content (page 2-40)
- Managing Content Available for Offline Use (page 2-41)
- Opening the Offline Content Manager (page 2-43)
- Working Offline (page 2-44)

About Syndication

Syndication lets you view a read-only copy of a content item that is checked into Content Server while you are disconnected from the server.

For example, you may need read-only access to a report for a presentation you are giving when you do not have access to the content server. With syndication, you obtain a copy of the current version of that report before you disconnect from the server and have read-only access to that file while working offline.

Important: Syndicated content is read-only. Because it can be accessed only through the Content Server folder hierarchy, the content remains synchronized with the content server. When online, you can update a syndicated content item by right-clicking the item and clicking **Refresh Syndication** on the popup menu that appears. The content item will then be overwritten by the most recent revision of that file in the content server. Be careful not to overwrite a read-only file with a writable one. For example, if you create a writable copy of a syndicated file and make changes to that, which you want to keep, this will result in synchronization problems.

Syndicating content entails:

- Marking Content for Syndication (page 2-39)
- Downloading the Most Recent Revision of Syndicated Content (page 2-40)
- Managing Content Available for Offline Use (page 2-41)

Marking Content for Syndication

You can syndicate any folder, project, or content item you have access to in the content server. Once you syndicate the content, you can view a read-only copy when you do not have access to it in the content server.

You can syndicate individual content items, or you can syndicate an entire folder or project as well. If you do so, when you choose the Work Offline option, a read-only copy of the content within the folder or project is available for your use.

Follow these steps to select content for syndication:

1. Connect to a server in the Content Server folder hierarchy. See Connecting to a Content Server (page 2-19) for details.
2. Navigate to and select the folder, project or content item to syndicate.
3. Right-click and select **Syndicate** from the popup menu.

A green mark in the lower right-hand corner of an icon () indicates the item is currently syndicated.

After you syndicate content items, the read-only content is available to you when you select the Work Offline option, described in Working Offline (page 2-44).

Before you go offline, you may want to refresh the content to ensure you have the most recent copy of a content item or the most recent folder hierarchy downloaded on your computer, described in Downloading the Most Recent Revision of Syndicated Content (page 2-40).

Downloading the Most Recent Revision of Syndicated Content

When you syndicate a folder, project, or content item, the content becomes available in read-only form when you work offline. Another feature of syndication is to ensure you have the most current revision of content before you disconnect from the content server to work offline.

Follow these steps to check for the most recent revision of syndicated content:

1. Right-click the top-level folder in the Content Server folder hierarchy and select **Offline Content Manager** from the popup menu.

Note: This option is only available at the top folder level, not at lower folder levels.

2. In the Offline Content Manager dialog box, highlight the content or folder you are currently syndicating and wish to check to ensure you have the most recent revision or, in the case of folders, the most recent hierarchy on your computer.
3. Click **Refresh**.

The most recent revision of syndicated content is downloaded to your system if the version in the content server does not match the version on your computer.

You can also navigate to and right-click the content or folder and select **Refresh Syndicated Content** from the popup menu. It is recommended that you use the Offline Content Manager as described above to manage the content that is available for offline use, because it is a convenient way to manage all of the content and folders you interact with through the Content Server folder hierarchy.

For more information on the Offline Content Manager, see Managing Content Available for Offline Use (page 2-41).

Managing Content Available for Offline Use

The Offline Content Manager offers a convenient way for you to view and manage the content you interact through the Content Server folder hierarchy.

You can view all of the content you have checked out and syndicated using the Offline Content Manager. You can also view offline content, which occurs when you syndicate a folder and the folder hierarchy is replicated for you. Within the folder you syndicate, content items in that hierarchy are available to you in a read-only format when you enter the offline mode.

You can perform the following tasks:

The options described below are also available in a popup menu when you right-click a content item or a folder in the Offline Content Manager dialog box.

Customizing the Offline Content Manager Display

You can view all checked out, syndicated, or offline content for any server in the Content Server folder hierarchy. Or, you can view only a subset of what is available, such as viewing only the syndicated content items for a particular server.

Follow these steps to customize the display of offline content:

1. From the Offline Content Manager, click **Filter**. The View Options dialog box displays.
2. Select what you would like to display.
3. Click **OK**.

Checking the Status

You can check the synchronization status of a content item or a folder with that item in the content server at any time by checking the status. Doing so can help you determine, for example, if the server is properly connected and if the content item or folder still exists in the content server.

To check the status of a content item or a folder, highlight the content item or folder and click **Check Status**.

Viewing Syndicated Content

When you have syndicated or checked out a content item, you can view a read-only copy of that item from the Offline Content Manager. When you view a read-only copy, the content item remains checked into the content server.

To view a read-only copy of a content item, highlight it and click **View**.

Refreshing Syndicated Content

When you have syndicated a folder, a project, or a content item, the information you syndicated becomes available to you in read-only form. You can ensure you have the most current revision of a folder hierarchy or content item before you go offline and disconnect from the content server. (You go offline when you are ready to disconnect and view your syndicated content and folder structure. See Working Offline on page 2-44.)

To refresh syndicated content, highlight it and click **Refresh**.

You now have the most recent revision of the current folder hierarchy or syndicated content. If a more recent revision of a content item exists on the content server, it has been downloaded to your computer.

Unsyndicating Content and Folders

When you no longer want to syndicate a folder or content item, you can unsyndicate it. Then, the read-only copy of the content or folder hierarchy is removed from your computer and is no longer displayed in the Offline Content Manager dialog

To unsyndicate a folder or content item, highlight it and click **Unsyndicate**.

When you unsyndicate a folder, the read-only copies of offline content items are also removed. Any syndicated content items or folders within that folder remain syndicated.

Checking in an Offline Content Item

You can check in content that you have checked out of the content server by highlighting the file and clicking **Check In** on the right-click popup menu.

When you check in the content item, a new revision is created in the content server and the content item no longer displays in the Offline Content Manager dialog box (unless it is syndicated or available for offline use).

Viewing Properties of Offline Content

To view the properties of a folder or content item, including the name, URL, and server, highlight the item and click **Properties**.

From here, you can reference the item's name, URL, and server.

Opening the Offline Content Manager

The Offline Content Manager offers a convenient way to manage the offline content you interact with using the Content Server folder hierarchy. See Managing Content Available for Offline Use (page 2-41) for more information.

Follow these steps to open the Offline Content Manager:

1. Right-click the top-level folder in the Content Server folder hierarchy.
2. Click **Offline Content Manager** on the popup menu.

Working Offline

When you syndicate folders or content items, you can access read-only copies of them before you disconnect from the content server by selecting the “Work Offline” option through the Content Server folder hierarchy. Selecting this option is used only in conjunction with syndication, which provides read-only access to content and folders.

Follow these steps to work offline:

1. Right-click the server for which you want to work offline and access syndicated content.
2. Click **Work Offline** from the popup menu.

   A red circle with a line through it displays on the server icon when it is offline:

Figure 2-24 Offline indicator

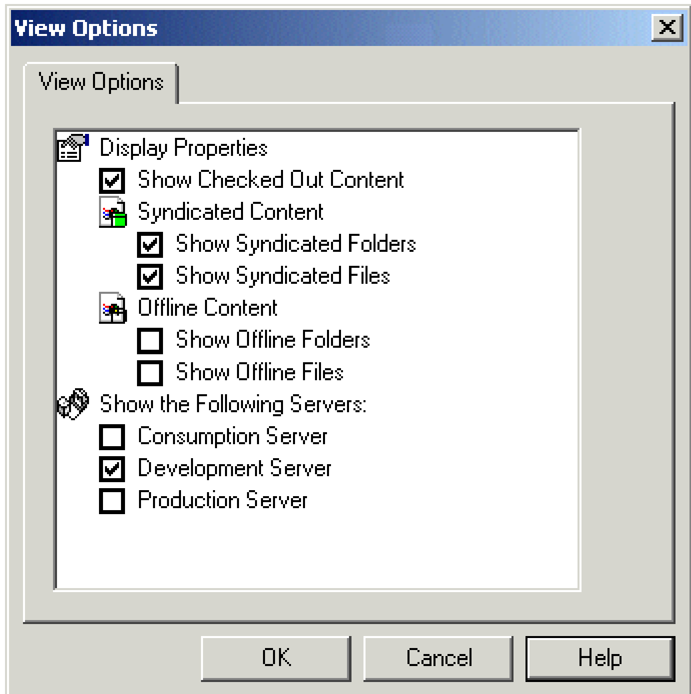
Also, there is a check mark to the left of the Work Offline option in the popup menu that displays when you right-click the server.

When you have finished working offline and are ready to reconnect to a server, right-click the server and click **Work Offline** from the popup menu so the check mark no longer displays.

The Offline Content Manager Filter

Use the View Options dialog box to determine the information that displays in the Offline Content Manager dialog box. This dialog box displays when you click **Filter** from the Offline Content Manager dialog.

Figure 2-25 View Options dialog



You can choose to display any combination of the following:

- **Show Checked Out Content**—Select to display content that you have checked out of the content server from the Content Server folder hierarchy.
- **Syndicated Content**—Select the appropriate check box to display folders or syndicated files in the Content Server folder hierarchy. Syndicated folders and files display with a green overlay in the bottom, right-hand corner of the icon.
- **Offline Content**—Select the appropriate check box to display folders or files that are available for offline use. When you syndicate a folder, the folder hierarchy is placed on your computer. You can then view a read-only copy of the offline files on your computer. Although these files are available for offline use, they are not syndicated. When you unsyndicate a folder, the offline folders and files may no longer reside on your computer. Offline content displays with a clear overlay in the bottom, right-hand corner of the icon.
- **Show the Following Servers**—Click the check box for one or more servers to display those servers regarding content that is available for offline use.

Offline PropertiesDialog Box

You can view the properties of a folder or a content item from the Offline Content Manager dialog box. The properties consist of the name, URL, and server of the folder or content item.

In the Offline Content Manager dialog box, right-click the folder or content item and click **Properties** to open the Properties dialog box.

Chapter

3

MANAGING CONTENT THROUGH THE COMMON DIALOGS INTERFACE

OVERVIEW

Integrating Content Server with your desktop applications improves your ability to manage content on the server. It provides a simplified interface for managing files in a common way from all of your desktop applications.

You can continue to access files on the content server through your browser, or you can work with files on your file system through the “common dialogs” that the integration provides.

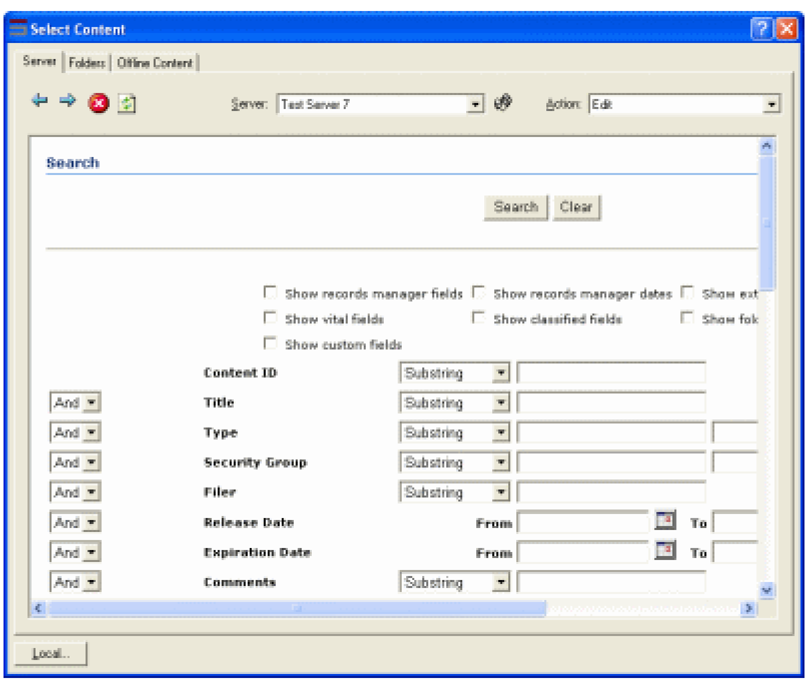
Managing files from your desktop consists of:

Note: Depending on your exact Windows operating system (2000, XP, or Vista), the screenshots in this guide may look slightly different from what you are seeing on your computer.

THE USER INTERFACE

When you integrate Content Server, a series of “common dialogs” is layered into your desktop applications. The Windows commands **New**, **Open**, **Save**, and **Save As** on the File menu now provide access to the Select Content dialog box which provides access to other dialog boxes that let you configure the content server and manage content.

Figure 3-1 Select Content dialog



The Select Content dialog box has three tabs:

- **Server**—On this tab you check items into and out of the servers you are using to store content. You also configure connections to those servers.
- **Folders**—On this tab you can view the local file system, save files to it, and open documents from it.
- **Offline Content**—This tab summarizes three types of content: new files in cache that have not been checked into the content server; read-only copies of files obtained from the content server; files checked out of the content server.

The Select Content dialog box displays as the Save dialog box when you save a document for the first time.

The three tabs (Server, Folders, and Offline Content) may not always appear. For example, when you click **OK** in the Desktop—New Document dialog box to save a document to the content server, only the Server tab is available.

UNDERSTANDING METADATA

Metadata is “data about data.” When you check a file into the content server, you associate information with the file that uniquely identifies it so that you can easily locate the file in the content server at any time.

Content Server uses three types of metadata: default, optional, and custom. The specific metadata fields used will depend on how your system administrator has configured the server. (If you are checking in e-mail messages and attachments from your e-mail client, you may also be using a fourth type of metadata, which is designed specifically for e-mail.)

Default metadata fields are preconfigured for the software and include the content ID and primary file. The content ID is a unique identifier and is usually automatically assigned and filled in. (If this is the case, you should not change it.) If the system was set up to allow you to enter a content ID, the field will display without any information.

The primary file is the path name to the native or original file being checked in. (For more information on metadata, open the Help system from the Content Server web browser interface.)

The content server can “remember” the metadata values used at check-in and automatically populate metadata fields each time you check in a content item. See Setting the Server to Remember Metadata (page 3-17).

MANAGING YOUR SERVER CONNECTIONS

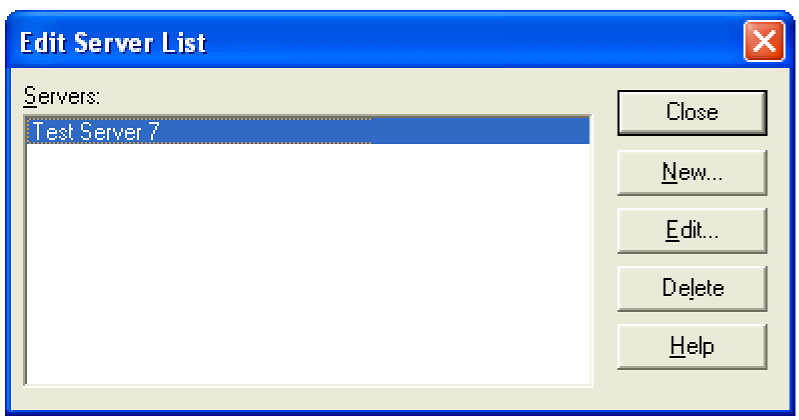
You manage all server connections on the client machine from the Edit Server List dialog box. Here, you can add and delete servers, as well as edit the server connections you have created.

Follow these steps to manage your server connections:

1. Click **File—Open** to open the Select Server dialog box.
2. Click **Server** to open that tab.
3. Click the **Server** icon () opposite the Server drop-down list.

   The Edit Server List dialog box opens.

Figure 3-2 Edit Server List dialog



4. To add a server, click **New**. (See Adding a Server Connection on page 3-5.)
5. To edit a server, select the server and click **Edit** to open the Edit Server dialog box. (See Editing a Server Connection on page 3-7.)
6. To delete a server, select the server and click **Delete**.
7. Click **OK**.

ADDING A SERVER CONNECTION

Once you have integrated Content Server with your desktop applications and have set up metadata for the content server, you are ready to connect each client machine to that server. You can connect to multiple servers, if you wish.

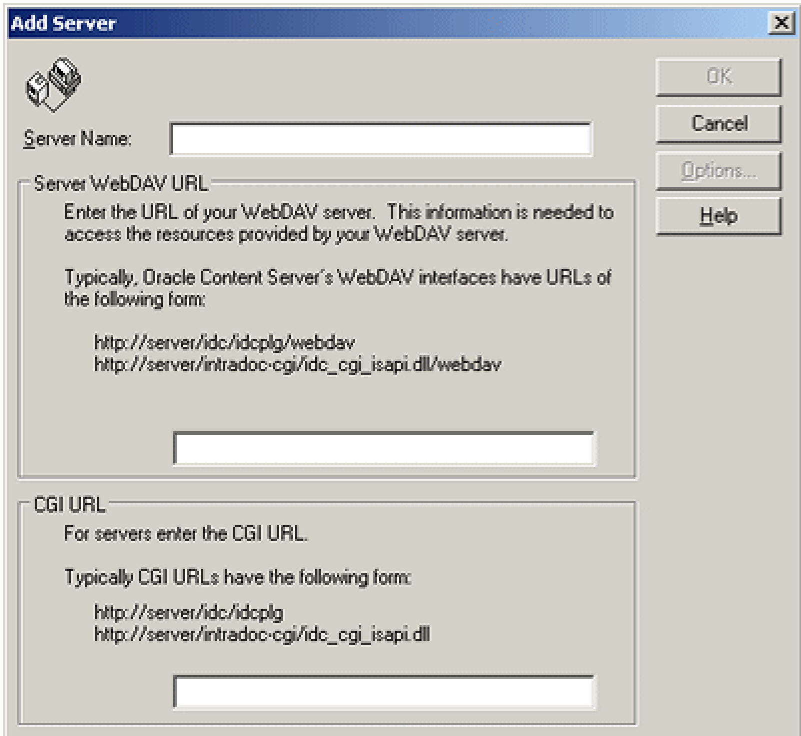
Follow these steps to add a new server connection:

1. Click **File—Open** to open the Select Content dialog box.
2. Click **Server** to open that tab.
3. Click the **Server** icon () opposite the Server drop-down list. The Edit Server List dialog box opens.

Figure 3-3 Edit Server List dialog

4. Click **New** to open the Add Server dialog box.

Figure 3-4 Add Server dialog



- In the **Server Name** text box, enter a name for the server you are about to configure (you can use any user-friendly name).
- In the text box under **Server WebDAV URL**, enter the web server URL.

  A URL is automatically inserted using the name you specified in the Server Name text box. You can also copy and paste one of the sample URLs provided.
- If you are using a regular content server, in the text box under **Oracle CGI URL**, enter the CGI URL.

Note: A URL is automatically inserted using the name you specified in the Server Name text box. You can also copy and paste one of the sample URLs provided. (If you're not sure about the CGI URL, see Determining the Server CGI URL Path on page 3-7 for more information.)

5. Click **OK**.

The new server connection will appear in all of the applications you use to interact with the content server. It also appears in Windows Explorer and your e-mail clients.

DETERMINING THE SERVER CGI URL PATH

When you integrate Content Server with your desktop applications, you need to know the CGI URL path for the server connections you make.

Follow these steps to determine the server CGI URL path:

1. Navigate to the search page in Content Server using your web browser.
2. In the browser Address or Location field, select and copy the Search page URL from the beginning up to, but not including, the question mark (?). This is the CGI URL path.
3. Paste this URL into the Oracle CGI URL field in the Add Server dialog box. (See Adding a Server Connection on page 3-5.)

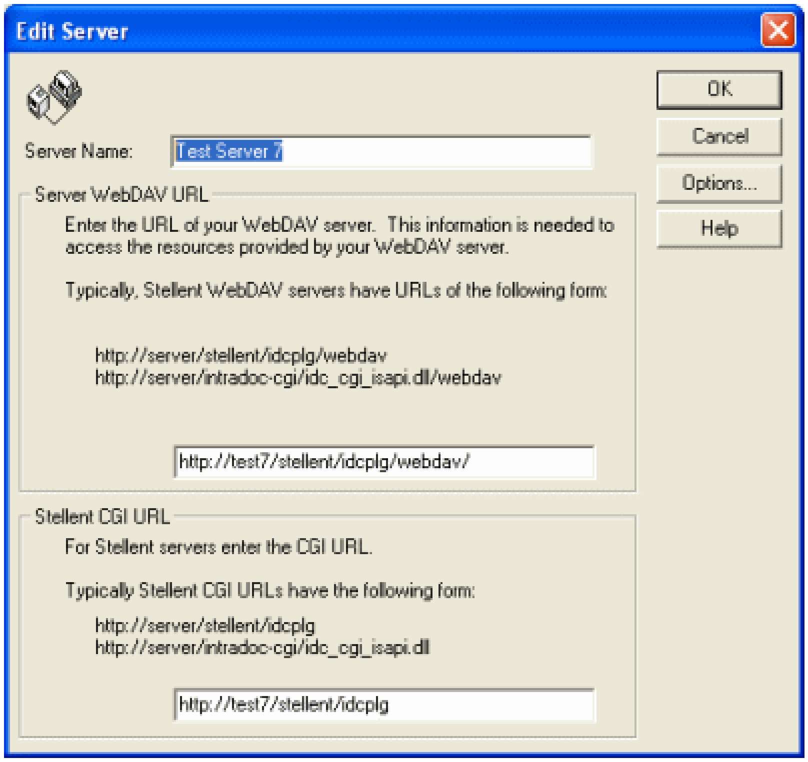
EDITING A SERVER CONNECTION

Once you have connected a client machine to one or more content servers, you can edit the server connections at any time.

Follow these steps to edit an existing server connection:

1. Click **File—Open** to open the Select Content dialog box.
2. Click **Server** to open that tab.
3. Click the **Server** icon () opposite the Server drop-down list. The Edit Server List dialog box opens.
4. Under Servers, select the server you want to edit. Click **Edit** to open the Edit Servers dialog box.

Figure 3-5 Edit Servers dialog



- In the **Server Name** text box, enter a new name for the server you want to edit (it can be any user-friendly name).
- In the text box under **Server WebDAV URL**, enter the web server URL path.

  You can cut and paste one of the samples shown in the panel and then replace "server" with the HTTP address of your server.
- In the text box under **Oracle CGI URL**, enter the CGI URL path.

  You can cut and paste one of the samples shown in the panel and then replace "server" with the HTTP address of your server. If you're not sure about the CGI URL path, see Determining the Server CGI URL Path (page 3-7).

5. Click **OK**.

You should only edit the WebDAV URL or CGI URL path if it was originally entered incorrectly. You should not create a new server connection by editing an existing one. Rather, you should add and delete server connections.

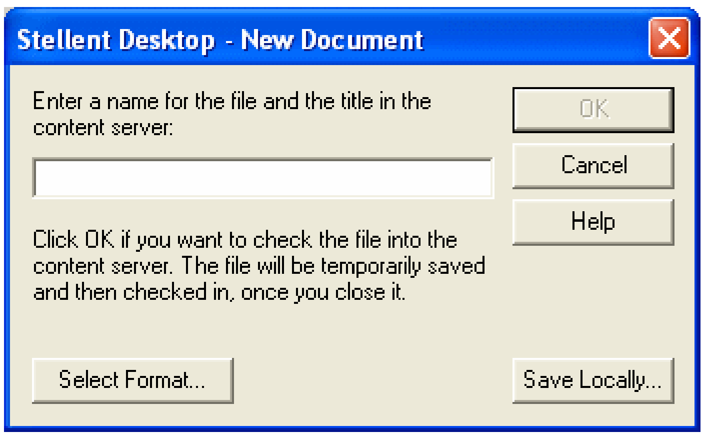
Creating a New File

Once you have configured one or more content servers, and have set the metadata that will be associated with files checked into those servers, you can begin managing your files in the content server from your desktop application.

Follow these steps to create a new file:

1. Click **File—Save**. The Desktop – New Document dialog box opens.

Figure 3-6 New Document dialog



2. Enter a title for the document in the text box. This title will automatically be used for the Title metadata in the content server.
3. If you have the option to save the file under a different format and wish to do so, click **Select Format** to open the Save File As Type dialog box.
4. Select the file format from the drop-down list and click **OK**.
5. In the New Document dialog box, click **OK** to return to your desktop application.

Note: The title you entered in the text box now displays in the Title bar of the file that is open in your desktop application. However, at this stage the file has been saved to cache only. You must formally close the file to save it to the content server for the first time.

6. Click **File—Close** to save the new document to the content server for the first time.

CHECKING A NEW FILE INTO THE CONTENT SERVER

When you save a file for the first time in your desktop application using the Desktop – New Document dialog box, the file is initially saved to cache (see Creating a New File on page 3-9). You are not prompted to check the file into the content server until you click **Close**.

Follow these steps to check a new file into the content server:

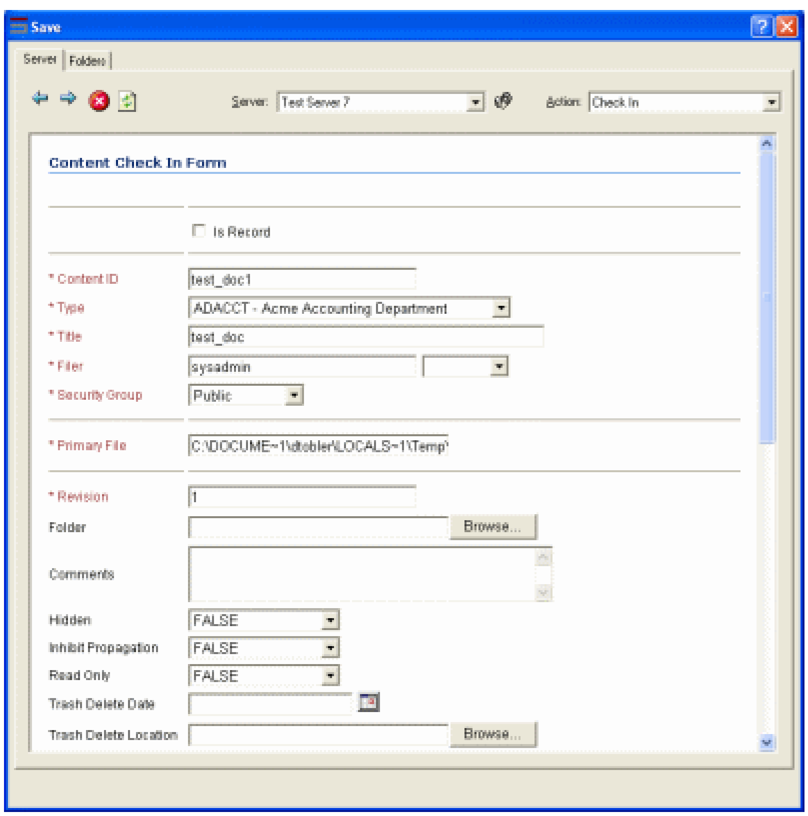
1. With the file open and saved in your desktop application, click **File—Close**.

   The Save dialog box opens. (This is the same as the Select Content dialog box, except that only the Server and Folders tabs are available.)

2. Click **Server** to open that tab dialog. The content check-in form is displayed for the last content server you used.

   If you have configured multiple content servers and want to check the file into another server, select that server from the Server drop-down list.

Figure 3-7 Sample content check-in form



3. Complete the content check-in form by entering required and other metadata.

   The metadata fields you see in the content check-in form are the default and other metadata your system administrator has set up for the content server.

4. Click the **Check In** button at the bottom of the screen to check the document into the content server.

If you cancel out of the Select Content dialog box before checking the file into the content server, the file will be saved to cache, instead. In that event, you can open the file in the future from the Offline Content tab. The file will be listed as “Unmanaged” in the Status column.

CHECKING AN EXISTING FILE INTO THE CONTENT SERVER

Once a new file has been checked into the content server, the file is associated with a specific content server and with the metadata associated with the file at the original check-in. Thereafter, you can check the file in and out of the content server at any time.

Each time you check in a file, the file is automatically checked into the same content server, with the previously assigned metadata. (You can change the metadata at check-in.) Also, a new revision of the file is created each time.

When you save a file that is open in your desktop application, the file is saved to cache. It is not formally saved in the server until you close the file and check it into the content server.

Follow these steps to check an existing file into the content server:

1. With the file open in your desktop application, click **File—Close**.
2. If the file contains new content that has not been saved, you are prompted to save the changes to the file. Click **OK**.
3. The **Save** dialog box opens, showing the content check-in form. Change the metadata, if you want.
4. Click **Check In**.

If you cancel out of the Save dialog box without checking the file in, the file will be saved to cache, instead. You will see the file listed in the Offline Content tab and can open it from there the next time you want to work on the file.

Checking a File Out of the Content Server

Once a new file has been checked into a particular content server, the file can be checked out at any time.

Follow these steps to check a file out of the content server:

1. Click **File—Open**.
2. In the **Select Content** dialog box, click the **Server** tab.
3. From the **Server** drop-down list, select the content server you want to check the file out of.
4. On the search page, enter the content ID, if you know it. Otherwise, enter appropriate search criteria, and then click **Search**. The **Search Results** table displays a list of content items that most closely match the search criteria.
5. From the **Action** drop-down list of the Select Content dialog box, click **Edit**.

Note: If the Edit option does not display, the content item is checked out by another user. You can select **View** to open a read-only copy or a new copy.

6. Click the **Select** button for the file you want to check out.
7. Click **OK**.

   The content item is automatically downloaded and opens in your desktop application. It will remain in cache and can be opened from the Offline Content tab until you formally check it back into the content server.

Viewing a File That Is in the Content Server

You can view a read-only version of a file at any time.

Follow these steps to view a file in the content server:

1. Click **File—Open**.
2. In the **Select Content** dialog box, click the **Server** tab.
3. From the **Server** drop-down list, select the content server you want to check the file out of.
4. On the search page, enter the search criteria, and then click **Search**. The **Search Results** table displays with a list of content that most closely match the search criteria.

5. From the **Action** drop-down list in the Select Content dialog box, select **View**.
6. Click **Select** for the file you want to view.
7. Click **OK**.

   A read-only version of the content item is automatically downloaded and opens in your desktop application. The Title bar displays **[Read Only]** immediately following the file name.

Once you obtain a read-only copy of a file from the content server, it can be opened in the future from the Offline Content tab in the Select Content dialog box. See Working With Content Offline (page 3-14).

Opening a Previous Revision

You can open a previous version of a content item, which is especially useful if you want to compare a previous version to the current version to identify changes between the two documents.

You can only obtain a read-only version of a previous revision.

Follow these steps to open a previous revision:

1. Click **File—Open**.
2. In the **Select Content** dialog box, click the **Server** tab.
3. From the **Server** drop-down list, select the content server that contains the file you want to check out.
4. On the search page, enter the search criteria, and then click **Search**. The **Search Results** table displays a list of contents that most closely match the search criteria.
5. Locate the file you are interested in and click the **Info** button to open the Content Information page.
6. From the list of revisions at the bottom of the page, click the revision you want to open.
7. Click the **Select** button to open a read-only version of the file in your desktop application.

When you close the file, it will be saved to cache. You can open this read-only copy of the file in the future from the Offline Content tab in the Select Content dialog box.

Saving a New File to the Local File System

When you create a new file in your desktop, you have the option of saving it to the local file system instead of the content server.

Follow these steps to save a new file to the local file system:

1. Click **File—Save**. The Desktop – New Document dialog box opens.
2. Enter a title in the text box.
3. Click **Save Locally**. The Select Content dialog box opens.
4. Click **Folders** to open that tab dialog.
5. Navigate in Windows Explorer to the folder where you want to save the file to.
6. Select the folder and click **Save**.
7. Click **OK**.

Opening a File From the Local File System

With Content Server integrated with your desktop applications, you can continue to save files to the local file system, if you prefer, and to open them from there at any time.

Follow these steps to open a file from the local file system:

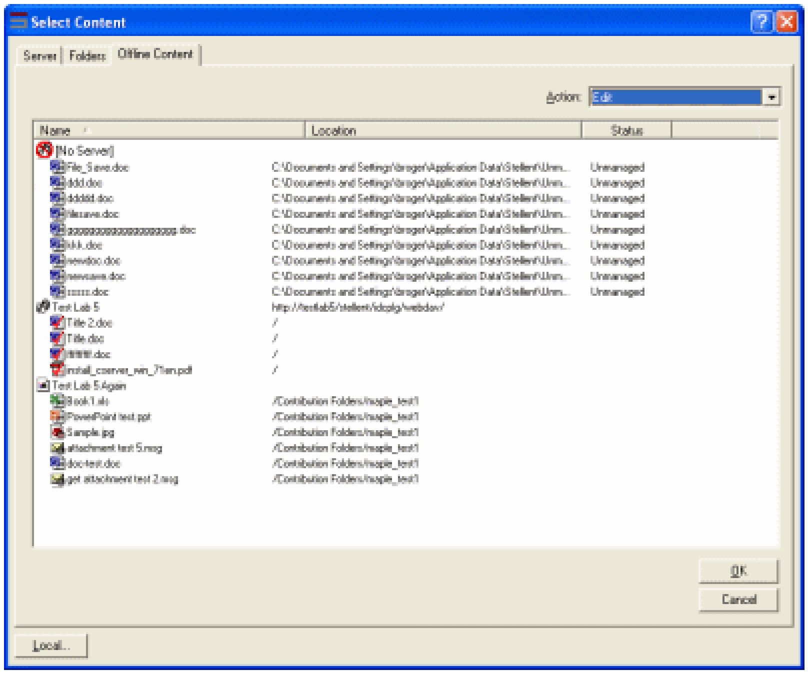
1. Choose **File—Open**.
2. In the Select Content dialog box, click **Folders** to display the file system.
3. Use the **Look In** drop-down box to locate the folder that contains the file.
4. Select the file and click **OK**. The file opens in your desktop application.

Working With Content Offline

The Offline Content tab of the Select Server dialog box summarizes three types of files:

- **New**—Files you saved but did not check into the content server when you closed the file.
- **Read-only**—Files you have obtained from the content server for viewing purposes.
- **Checked out**—Files you have checked out of the content server and are currently working on.

Figure 3-8 Offline Content tab



This section covers the following topics:

❖ New Files (page 3-15)

❖ Read-Only Files (page 3-16)

❖ Checked-Out Files (page 3-16)

New Files

When you create a new document in your desktop application, you initially name the file in the Desktop – New Document dialog box. If you plan to save the file to the content server, you click **OK** (rather than **Save Locally**). The file is then saved to cache. Only later, when you click **Close**, are you prompted to check the file into the content server.

Then, the Save dialog box appears (the Select Content dialog box with only the Server tab available). If you choose to close the dialog box without actually checking the file into the content server, the file will remain in cache and will be listed as “Unmanaged” (under Status) in the Offline Content tab. It can be opened from that tab at any time.

Read-Only Files

You can obtain a read-only copy of a file from the content server at any time. You may want to do this if you anticipate being disconnected from the server and would like to at least have a viewable version of the file available.

See Viewing a File That Is in the Content Server (page 3-12).

Checked-Out Files

When you formally check files out of the content server, these files are also listed in the Offline Content tab. In this case, they are identified by the server (and folder) you have checked them out of. These files remain in cache until you formally check them back into the content server.

SETTING THE AUTHENTICATION METHOD

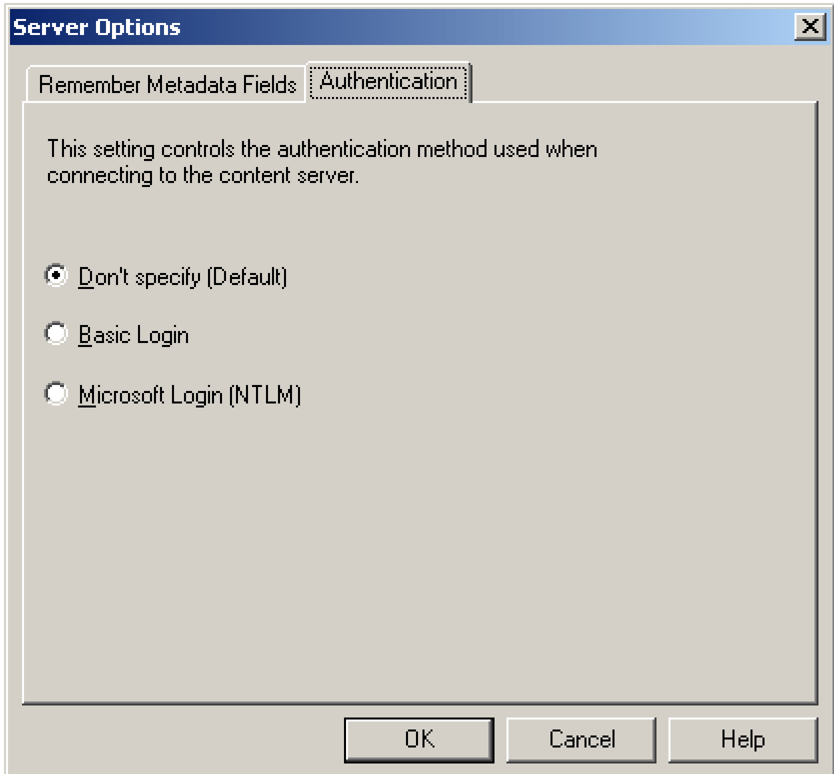
When you create a connection to a server, your server options include the ability to set an authentication method by which users can log on.

Typically, the authentication method is set up by the system administrator and should not be changed.

Follow these steps to set the authentication method:

1. Click **File—Open** to open the Select Content dialog box.
2. Click **Server** to open that tab.
3. Click the **Server** icon () opposite the Server drop-down list. The Edit Server List dialog box opens.
4. Select the server you want to set the authentication method for and click **Options**.
5. In the Server Options dialog box, click the **Authentication** tab.

Figure 3-9 Authentication tab



6. Select the authentication method you want to use.

Note: The default setting is whatever has been set up for your content server. If you select Microsoft Login (NTLM), you are using NTLM security. In that event, your user name and password are automatically supplied when you click the server, so you may not be prompted for login information.

7. Click **OK**.

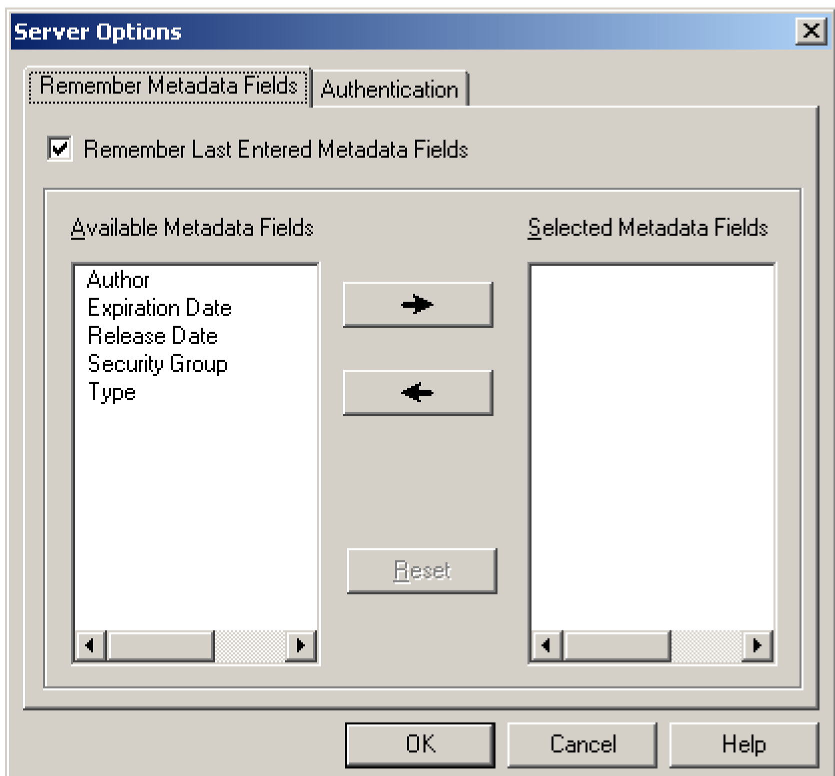
SETTING THE SERVER TO REMEMBER METADATA

You can have the content server “remember” the metadata values you use at check-in and populate the metadata fields with those values at the next check-in. Any time you change one or more values at check-in, the new values are retained until you change them again. You can select which metadata fields are to be remembered in this way.

Follow these steps to set the server to remember metadata:

1. Click **File—Open** to open the Select Content dialog box.
2. Click **Server** to open that tab.
3. Click the **Server** icon () opposite the Server drop-down list. The Edit Server List dialog box opens.
4. Select the server you want to set the authentication method for and click **Options**.
5. In the Server Options dialog box, click the **Remember Metadata fields** tab.
6. Click **Remember Last Entered Metadata Fields**. The Available Metadata Fields text box now lists the metadata available on the content server.

Figure 3-10 Available metadata fields



7. Under **Available Metadata Fields**, select the specific metadata fields you want to be remembered and click the right arrow button to move those fields under **Selected Metadata Fields**.

Note: If you do not want a selected metadata field to be remembered anymore, select the field under Selected Metadata Fields and click the left arrow button to move the field under Available Metadata Fields.

8. Click **OK** to return to the Server dialog box.

The values you enter at the next check-in of a content item will be remembered for future check-ins. Each time you change a value, the new value will be remembered until you change it again.

Chapter

4

MANAGING CONTENT THROUGH YOUR E-MAIL CLIENT

OVERVIEW

E-Mail client integration allows you to integrate Microsoft Outlook or Lotus Notes with Content Server. As a result, you can check e-mail messages and their attachments into or out of the content server directly through your e-mail client and share them with others in your organization.

The following components are available:

- **EmailMetadata component**—Extracts information from Microsoft Outlook messages (MSG) and Internet Mail Messages (EML) and populates e-mail-specific fields in the content server. This happens when users check in files using the Content Server Folders functionality in Microsoft Outlook, Lotus Notes, or Windows Explorer. This also happens when checking in MSG or EML files using the web browser interface.
- **Records Management Email component**—Enables you to check distribution lists into the content server using Microsoft Outlook or Lotus Notes.

Once you have integrated your e-mail client with the content server, you need to set up metadata on the content server that will be used to store the e-mail messages and attachments, and then connect each client machine to that server.

This section covers the following topics:

Any server connection you add through one integrated application applies to all integrated applications. If you have already connected to a content server through another application, you do not need to add a separate connection through the e-mail client.

Note: Depending on your exact Windows operating system (2000, XP, or Vista), the screenshots in this guide may look slightly different from what you are seeing on your computer.

Setting Up Metadata on a Content Server

After integrating the e-mail client with Content Server, the next step is to set up the metadata on each content server you plan to use for storing e-mail messages and attachments.

Metadata is information about a content item that helps to define that content item when it is stored in the content server. Metadata is automatically associated with each content item you check into the content server. It uniquely identifies that item and simplifies searches in the server.

Four types of metadata can be used with the e-mail client: default, optional, custom, and e-mail:

Metadata	Comment
Default	Also known as standard or predefined metadata: Content ID, Title, Type, Author, Security Group, Primary File, Release Date, and Revision. Required for every instance of the server and associated with every content item checked into the server.

Metadata	Comment
Optional	Available for the content server but do not display automatically at check-in: Account, Alternative File, and Expiration Date. These can be enabled by your system administrator.
Custom	Created specifically for your company. They can be anything you want. Examples: Project, Part Number, Deadline Date, Project Status, Department, and Location.
E-mail	Special metadata for use with the e-mail client: EmailFrom, EmailCC, EmailSubject, EmailTo, PublicationDate, and ReceiveDate.

For more information on default, optional, and custom metadata, see the Content Server Help system. For more information on e-mail metadata, see the *Desktop Integration Suite Installation Guide*.

Once metadata has been set up for the content server, you can connect each client machine to the content server.

This section covers the following topics:

❖ E-Mail Specific Metadata (page 4-3)

❖ Configuring the Server to Remember Metadata (page 4-4)

❖ Configuring Your E-Mail Check-In Settings (page 4-7)

E-Mail Specific Metadata

Six e-mail specific metadata fields are available for use with the e-mail client: EmailFrom, EmailTo, EmailCC, EmailSubject, PublicationDate and ReceiveDate. These optional fields are not required for the e-mail client to function with the content server. (They are installed automatically with the Records Management Email component; otherwise, they must be installed manually.) If used, these metadata fields are pre-populated with available values when you check an e-mail or attachment into the content server.

The following metadata field names with possible labels might be used on the server.

Metadata Field Name	Label in Content Server
EmailFrom	Author or Originator
EmailTo	Addressee(s)
EmailCC	Other Addressee(s)
EmailSubject	Email Subject
PublicationDate	Publication Date
ReceiveDate	Received Date

Configuring the Server to Remember Metadata

When you connect each client machine to the content server, you have the option of identifying metadata to be "remembered" each time you check in an e-mail or attachment.

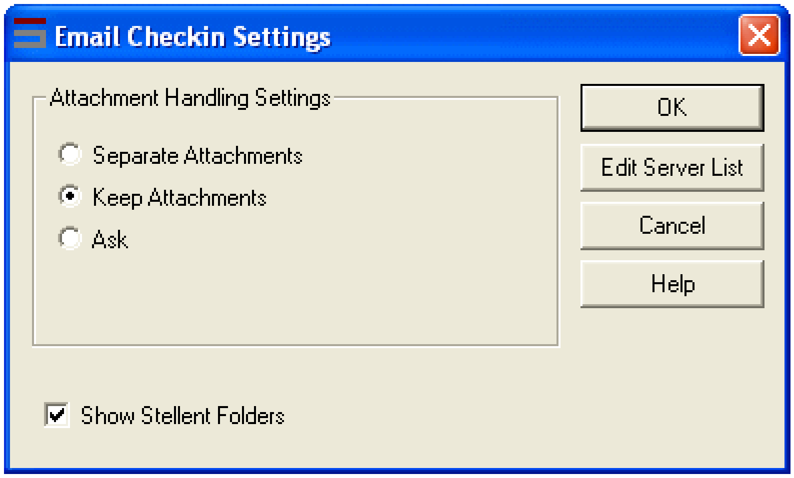
If you designate a metadata field to be remembered, whatever you populate that metadata field with for the check-in of a particular item will display the same value when you check in a content item. Each time you change a value at check-in, it is remembered and automatically used during the following check-in.

Follow these steps to specify the metadata to be remembered:

1. Open the e-mail client (Microsoft Outlook or Lotus Notes).
2. Open the Email Checkin Settings dialog box as follows:
   - ❖ In Microsoft Outlook, click **Tools—Email Client Integration Settings**.
   - ❖ In Lotus Notes, click **Actions—Email Client Integration Settings**.

   The Email Checkin settings dialog is displayed.

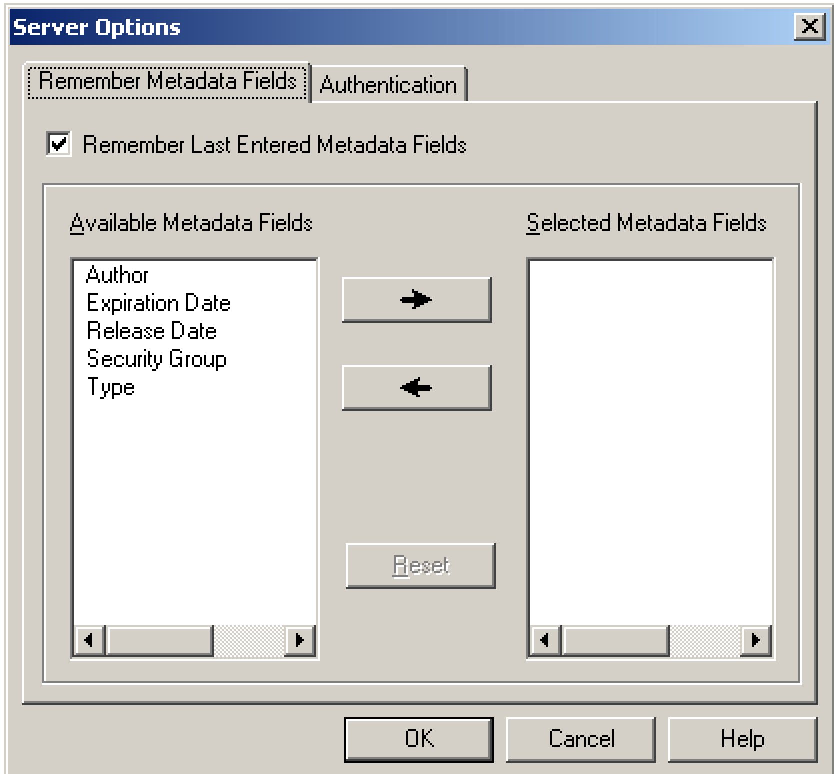
Figure 4-1 Email Checkin settings dialog



The “Show Folders” option is a Lotus Notes feature (see Showing Content Server Folders in Lotus Notes on page 4-19).

3. Click **Edit Server List**.
4. In the Edit Server List dialog box, under **Servers**, select the content server that you want to edit.
5. Click **Edit** to open the Edit Server dialog box.
6. Click **Options** to open the Server Options dialog box.

Figure 4-2 Server Options dialog



7. On the **Remember Metadata Fields** tab, click **Remember Last Entered Metadata Fields**. The metadata fields available in the content server display in the Available Metadata Fields list.
8. Select the metadata fields that you want to be remembered in the content server each time you check in a content item.
   - To use one or more metadata, select each one under "Available Metadata Fields" and click the right arrow.

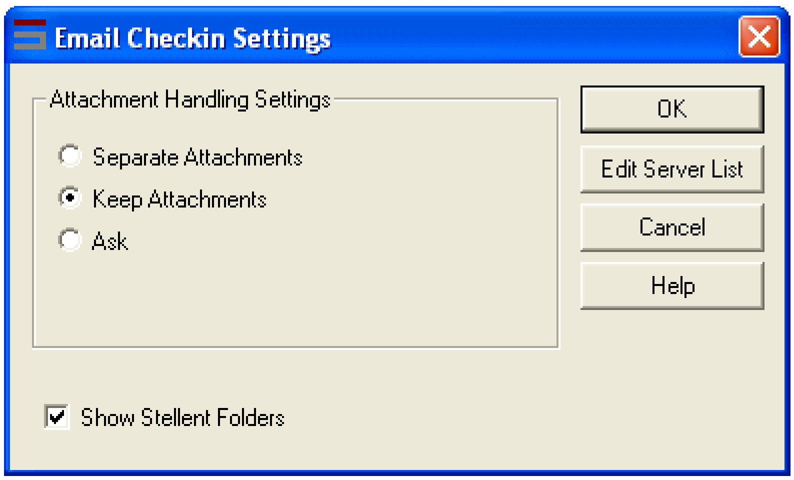
     Each metadata you select displays under "Selected Metadata Fields."
   - To no longer use one or more selected metadata fields, select each field under "Selected Metadata Fields" and click the left arrow.

     Each field you selected displays under "Available Metadata Fields."
9. Click **OK** to close the Server Options dialog box, click **OK** to close the Edit Server dialog box, click **Close** to close the Edit Server List dialog box, and lastly, click **OK** to close the Email Checkin Settings dialog box.

Configuring Your E-Mail Check-In Settings

You make most of your configuration settings for Email Client Integration in the Email Checkin Settings dialog box.

Figure 4-3 Email Checkin Settings dialog



The "Show Folders" option is a Lotus Notes feature (see Showing Content Server Folders in Lotus Notes on page 4-19).

You access this dialog box from the Tools menu in Microsoft Outlook (**Tools—Email Client Integration Settings**), or the Actions menu in Lotus Notes (**Actions—Email Client Integration Settings**).

You can perform the following tasks in this dialog box:

- Setting the E-Mail Attachment Option (page 4-13)
- Managing Your Server Connections (page 4-8)
- Configuring the Server to Remember Metadata (page 4-4)
- Setting the Authentication Method (page 4-12)

MANAGING YOUR SERVER CONNECTIONS

You can add, edit, or delete a server connection at any time, as explained in the following topics:

- Adding a Server Connection (page 4-8)
- Viewing the Server CGI URL Path (page 4-11)
- Editing a Server Connection (page 4-11)
- Removing a Server Connection (page 4-12)
- Setting the Authentication Method (page 4-12)
- Setting the E-Mail Attachment Option (page 4-13)

Adding a Server Connection

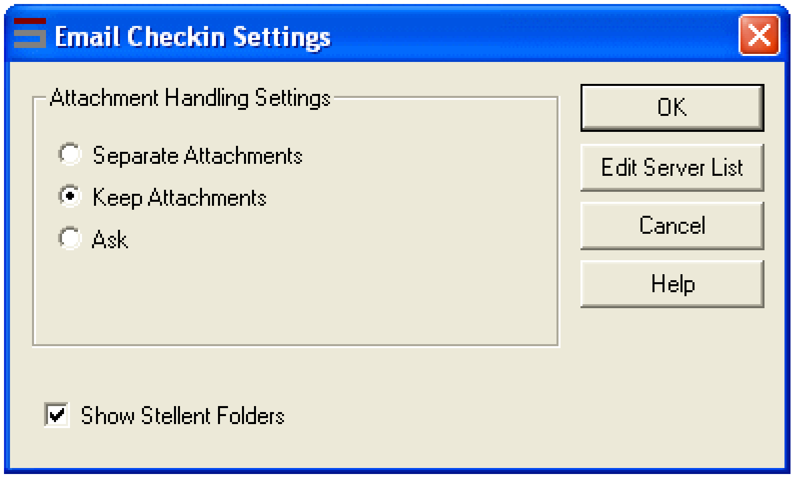
Once you have installed the e-mail client integration and have set up metadata for the content server, you can connect one or more client machines to the content server.

Follow these steps to add a new server connection:

1. Open the e-mail client (Microsoft Outlook or Lotus Notes).
2. Open the Email Checkin Settings dialog box as follows:
   - In Microsoft Outlook, click **Tools—Email Client Integration Settings**.
   - In Lotus Notes, click **Actions—Email Client Integration Settings**.

   The Email Checkin Settings dialog is displayed.

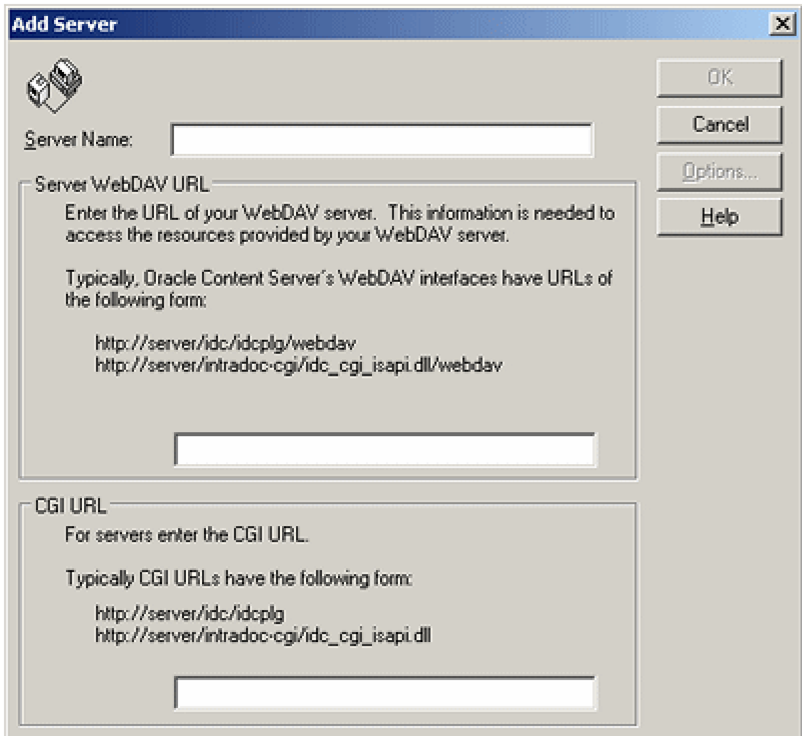
Figure 4-4 Email Checkin Settings dialog



The “Show Folders” option is a Lotus Notes feature (see Showing Content Server Folders in Lotus Notes on page 4-19).

3. Click **Edit Server List**.
4. In the Edit Server List dialog box, click **New**.
5. In the Add Server dialog box, enter a value for the **Server Name** (you can use a user-friendly name).

Figure 4-5 Add Server dialog



- In the text box under **Server WebDAV URL**, enter the web server URL.

Note: A URL is automatically inserted using the name you specified in the Server Name text box. You can also cut and paste one of the samples provided.

- If you are using a regular content server, in the text box under **Oracle CGI URL**, enter the CGI URL.

Note: A URL is automatically inserted using the name you specified in the Server Name text box. You can also cut and paste one of the samples provided. (If you're not sure about the CGI URL, see Determining the Server CGI URL Path on page 3-7 for more information.)

6. Click **OK** to close the Add Server dialog box, click **Close** to close the Edit Server List dialog box, and then click **OK** to close the Email Checkin Settings dialog box.

The new server connection will appear in all of the applications you use to interact with the content server (Windows Explorer, e-mail clients, and other integrated applications).

Viewing the Server CGI URL Path

Integrating an e-mail client with Content Server entails configuring the content server. If you are using a regular server, you will use the CGI URL path for the server.

Follow these steps to view the server CGI URL path:

1. Navigate to the search page in Content Server using your web browser.
2. In the browser Address or Location field, select and copy the Search page URL from the beginning up to, but not including, the question mark (?). This is the CGI URL path.
3. Paste this URL into the CGI URL field in the Add Server dialog box.

Editing a Server Connection

Once you have created a server connection from a client machine to a content server, you can edit that connection at any time.

Follow these steps to edit an existing server connection:

1. Open the e-mail client (Microsoft Outlook or Lotus Notes).
2. Open the Email Checkin Settings dialog box as follows:
   - ❖ In Microsoft Outlook, click **Tools—Email Client Integration Settings**.
   - ❖ In Lotus Notes, click **Actions—Email Client Integration Settings**.
3. Click **Edit Server List**.
4. In the Edit Server List dialog box, highlight the server connection and click **Edit**.
5. In the Edit Server dialog box, change the value for **Server Name** and **Server WebDAV URL** (if using a WebDAV server) or **CGI URL** (if using a regular content server).

   You can cut and paste one of the samples shown in the panel and then replace "server" with the HTTP address of your server. (If you're not sure about the CGI URL, see Determining the Server CGI URL Path on page 3-7 for more information.)
6. Click **OK** to close the Edit Server dialog box, click **Close** to close the Edit Server List dialog box, and then click **OK** to close the Email Checkin Settings dialog box.

Removing a Server Connection

Once you have created a server connection from a client machine to a content server, you can remove that connection at any time.

Follow these steps to remove a server connection:

1. Open the e-mail client (Microsoft Outlook or Lotus Notes).
2. Open the Email Checkin Settings dialog box as follows:
   - ❖ In Microsoft Outlook, click **Tools—Email Client Integration Settings**.
   - ❖ In Lotus Notes, click **Actions—Email Client Integration Settings**.
3. Click **Edit Server List**.
4. In the Edit Server List dialog box, highlight the server connection and click **Delete**.

   The Confirm Server Removal dialog box displays.
5. Click **OK** to confirm the deletion.
6. Click **Close** to close the Edit Server List dialog box, and then click **OK** to close the Email Checkin Settings dialog box.

This removes the server connection from all of the applications you use to interact with the content server (Windows Explorer, e-mail clients, and other integrated applications).

Setting the Authentication Method

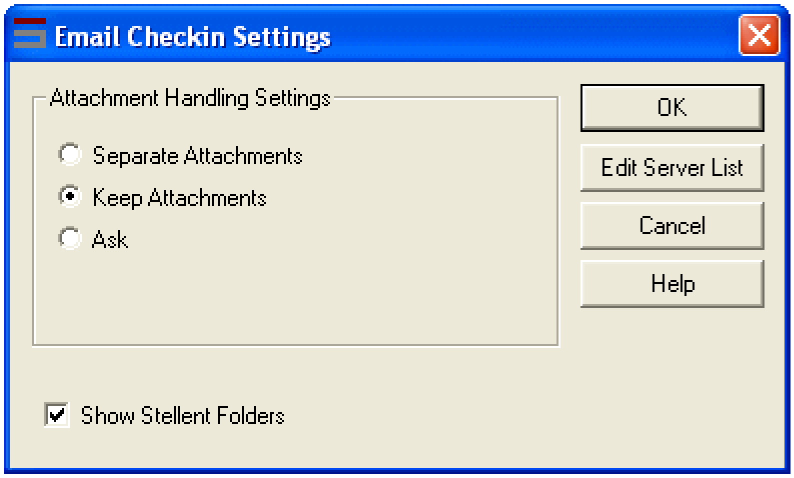
When connecting each client machine to the content server you are using to store e-mail messages and attachments, you can decide how users are to log in to the server.

Follow these steps to edit the login from a client machine:

1. Open the e-mail client (Microsoft Outlook or Lotus Notes).
2. Open the Email Checkin Settings dialog box as follows:
   - ❖ In Microsoft Outlook, click **Tools—Email Client Integration Settings**.
   - ❖ In Lotus Notes, click **Actions—Email Client Integration Settings**.

   The Email Checkin Settings dialog is displayed.

Figure 4-6 Email Settings dialog



The “Show Folders” option is a Lotus Notes feature (see Showing Content Server Folders in Lotus Notes on page 4-19).

3. Click **Edit Server List**.
4. In the Edit Server List dialog box, under **Servers**, select the content server that you want to edit.
5. Click **Edit** to open the Edit Server dialog box.
6. Click **Options** to open the Server Options dialog box.
7. Click the **Authentication** tab.
8. Select the login authentication that you want to use.

   Don’t specify (Default) means the standard Content Server login will apply. If you select **Microsoft Login (NTLM)**, you are using NTLM security. In that event, the username and password are automatically supplied when you access the server, so you may not be prompted for login information.
9. Click **OK** to close the Server Options dialog box, click **OK** to close the Edit Server dialog box, click **Close** to close the Edit Server List dialog box, and lastly, click **OK** to close the Email Checkin Settings dialog box.

Setting the E-Mail Attachment Option

When you check e-mail messages with attachments into the content server, you have the option of checking in an attachment separately from its e-mail message or checking in both as a single content item. You can set this to be handled automatically. If you prefer, you can, instead, be prompted to make the choice when you check each e-mail message with an attachment into the server.

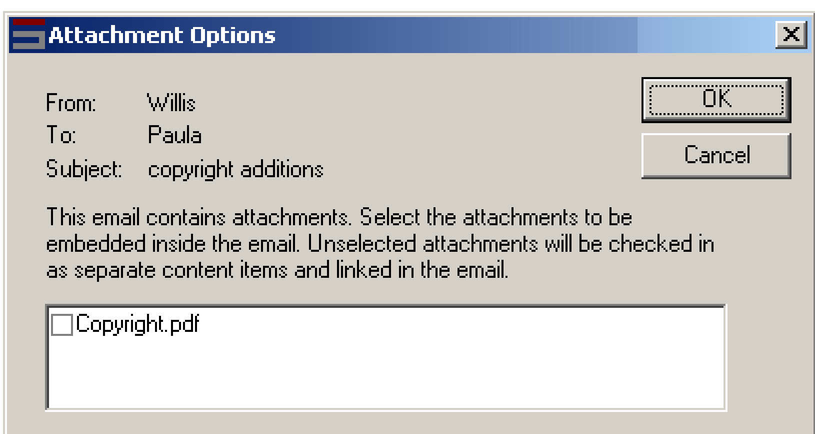
Note: An “attachment” is any file formally attached to an e-mail.

1. Open the e-mail client (Microsoft Outlook or Lotus Notes).
2. Open the Email Checkin Settings dialog box as follows:
   - ❖ In Microsoft Outlook, click **Tools—Email Client Integration Settings**.
   - ❖ In Lotus Notes, click **Actions—Email Client Integration Settings**.

   The Email Checkin settings dialog is displayed.

   The “Show Folders” option is a Lotus Notes feature (see Showing Content Server Folders in Lotus Notes on page 4-19).
3. Select the option you want to use for handling e-mail attachments:
   - ❖ **Separate Attachments** – The attachment will be checked into the content server separately, with its own content ID.
   - ❖ **Keep Attachments** – The attachment will be embedded in the e-mail message and both will be checked in as a single content item with a single content ID.
   - ❖ **Ask** – Each time you check in an e-mail item with an attachment, you will be prompted with the following message:

Figure 4-7 Email prompt message



The attachment(s) are listed in the text box. Select the check box before the file name for each attachment you want to embed in the e-mail message. Clear the check box for any attachment you want to check into the server separately, with its own content ID.

4. Click **OK** to close the Email Checkin Settings dialog box

The attachment will be checked in first, followed by the e-mail message. You can check in an attachment by itself. After the attachment is checked in, simply cancel the content check-in form when it reappears for the e-mail check-in.

CHECKING IN CONTENT

Once you have integrated your e-mail client with the content server, configured the metadata on the server, and connected client machines to the server, you are ready to use the content server for storing e-mail and attachments and sharing them with others in your organization.

The integration of an e-mail client with a content server allows you to contribute e-mail and attachments to the server for sharing with others. (With the Records Management Email component, you can also check in distribution lists. See Working With Distribution Lists on page 4-19.) However, you cannot check them out using the e-mail client. Instead, you need to access the server using your browser, and then open them from there to view using your e-mail program.

This section covers the following topics:

Checking In an E-Mail Message

You can check e-mail messages into the content server using your e-mail client at any time.

If you have chosen to "remember" the metadata used for the last check-in of an e-mail or attachment, these fields will be pre-populated so that you can immediately check in a new item using the same metadata as before (see Configuring the Server to Remember Metadata on page 4-4).

Follow these steps to check an e-mail message into the content server:

1. Open the e-mail client (Microsoft Outlook or Lotus Notes).
2. Select the e-mail message you want to check in.

You can select multiple messages, if you like. In Outlook, use the Ctrl or Shift key to select multiple messages, and in Lotus Notes, click your mouse beside each message until you see a check mark beside it.

3. Check in the e-mail message as follows:
   - In Microsoft Outlook, click the **Check In Mail Item** button on the toolbar.
   - In Lotus Notes, click **Actions—Check In Mail Item**.

   This opens the Save dialog box with the content server's content check-in form displaying. (You may be prompted to enter your login credentials first.)

4. From the Server drop-down list, select the server you want to check the e-mail message into.

   If the server you want to use is not listed, click the **Server** icon ( ) and follow the steps in Adding a Server Connection (page 4-8). (Again, you may be prompted to enter your login credentials.)

5. Fill out the content check-in form and click **Check In** when you are done.

   If you selected metadata fields to be remembered, then the values you entered for the last item you checked in will already be populating the fields (see Configuring the Server to Remember Metadata on page 4-4).

The metadata that is displayed on the content check-in form varies, depending on how your content server is set up. If the content server is set up to use the e-mail-specific metadata (EmailFrom, EmailCC, EmailTo, EmailSubject, PublicationDate, and ReceiveDate fields), the information for those fields is automatically placed in the content check-in form, if available. (With e-mail-specific metadata set up, the subject line of an e-mail message appears in two metadata fields: Title and Email Subject.)

As an alternative to checking in e-mail messages this way, you can use your mouse and drag-and-drop each message into the desired folder of the Content Server folder hierarchy. In Outlook, you simply drag the message onto the desired folder. In Lotus Notes, however, you need to click in the column beside the message to place a checkmark there and then drag the message onto the desired folder.

Checking In an E-Mail Message With Attachments

You can check e-mail messages and their attachments into the content server using your e-mail client at any time.

If you have chosen to remember the metadata used for the last check-in of an e-mail or attachment, these fields will already be populated when you open the content check-in form (assuming the values are available) so that you can immediately check in the item using the same metadata as before (see Configuring the Server to Remember Metadata on page 4-4).

You can change the metadata, if you wish. The new metadata values you enter will be remembered the next time you check in a content item.

When you view an e-mail that is checked into the content server that contains one or more attachments, the URL to the Info page for the most recent revision of each attachment displays at the bottom of the message. (If you are using the RM Email component, however, the URL to the Info page always Heading Text + Pages to the first revision, regardless of whether the content item has newer revisions.) Also, Outlook VCard (.vcf) files are not checked into the content server.

Follow these steps to check an e-mail message and its attachments into the content server:

1. Open the e-mail client (Microsoft Outlook or Lotus Notes).
2. Select the e-mail message with attachments that you want to check in.

Note: You can select multiple messages, if you like. In Outlook, use the Ctrl or Shift key to select multiple messages, and in Lotus Notes, click your mouse beside each message until you see a check mark beside it.

3. Check in the e-mail message as follows:
   - ❖ In Microsoft Outlook, click the **Check In Mail Item** button on the toolbar.
   - ❖ In Lotus Notes, click **Actions—Check In Mail Item**.
4. If you selected the **Ask** option for handling e-mail attachments (see Setting the E-Mail Attachment Option on page 4-13), the Attachment Options dialog box displays with a list of the attachments.
5. Select the attachments you want to check in with the e-mail message as a single content item. Any attachments not selected will be checked in separately from the e-mail message. Click **OK**.

6. This opens the Save dialog box with the content server's content check-in form displaying. (You may be prompted to enter your login credentials first.)

   If you selected "Separate Attachments" or "Keep Attachments" as your option for handling attachments (see Setting the E-Mail Attachment Option on page 4-13), then you would bypass the Attachment Options dialog box and go straight to the Save dialog box.

7. From the Server drop-down list, select the server you want to check the e-mail message into.

   If the server you want to use is not listed, click the **Server** icon ( ) and follow the steps in Adding a Server Connection (page 4-8). (Again, you may be prompted to enter your login credentials.)

8. Fill out the content check-in form (this will be for the attachment) and click **Check In**.

   If you selected metadata fields to be remembered, then the values you entered for the last item you checked in will already be populating the fields (see Configuring the Server to Remember Metadata on page 4-4).

9. The content check-in form appears again, and it will apply to the next attachment (if there is more than one). If not, it applies to the e-mail message itself.

10. Fill out the form and click **Check In**.

The metadata that is displayed on the content check-in form depend on how your content server is set up. If you are using the e-mail specific metadata (EmailFrom, EmailCC, EmailTo, EmailSubject, PublicationDate, and ReceiveDate fields), the information for those metadata fields will have been automatically entered in the content check-in form. (With e-mail specific metadata set up, the subject line of an e-mail message appears in two metadata fields: Title and Email Subject.)

As an alternative to checking in e-mail messages this way, you can use your mouse and drag-and-drop each message into the desired folder of the Content Server folder hierarchy. In Outlook, you simply drag the message onto the desired folder. In Lotus Notes, however, you need to click in the column beside the message to place a checkmark there and then drag the message onto the desired folder.

Showing Content Server Folders in Lotus Notes

As you work in Lotus Notes, you can choose to show or hide Content Server folders in the hierarchy that appears in the lower left pane and in the right pane of the screen. You do this in the Email Checkin Settings dialog box.

This option is only available if you have design rights to the Notes database. For more information, contact your Lotus Notes Administrator.

Follow these steps to show or hide Content Server Folders in Lotus Notes:

1. Open Lotus Notes.
2. Click **Actions—Oracle Email Client Integration Settings** to open the Email Checkin Settings dialog box.
3. Perform one of the following:
   - ❖ Check the box **Show Folders** to show Content Server Folders in Lotus Notes.
   - ❖ Uncheck the box **Show Folders** to hide Content Server Folders in Lotus Notes.
4. Click **OK** to return to Lotus Notes.

Working With Distribution Lists

A distribution list is a collection of e-mail addresses grouped under a common name. Any message addressed to the group name is sent to everyone on the list.

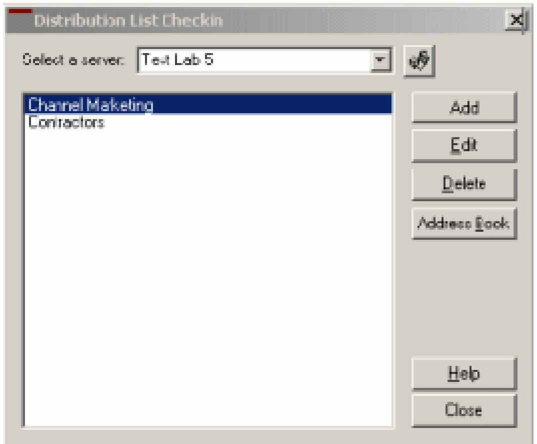
If your content server uses the RM Email component, you can check distribution lists into the content server: ones that already exist in a Microsoft Outlook address book or new ones you create. Once the distribution list is checked in, you can edit it, as needed.

This feature requires the Records Management (RM) Email component.

You work with distribution lists from the Checkin Distribution List dialog box.

- ❖ On the Outlook Menu bar, click **Tools—Check In Distribution List**.
- ❖ On the Lotus Notes Menu bar, click **Actions—Check In Distribution List**.

Figure 4-8 Distribution List screen



This dialog box is used for:

- ❖ Checking In a Distribution List (page 4-20)
- ❖ Editing a Distribution List (page 4-23)
- ❖ Deleting a Distribution List (page 4-26)

Checking In a Distribution List

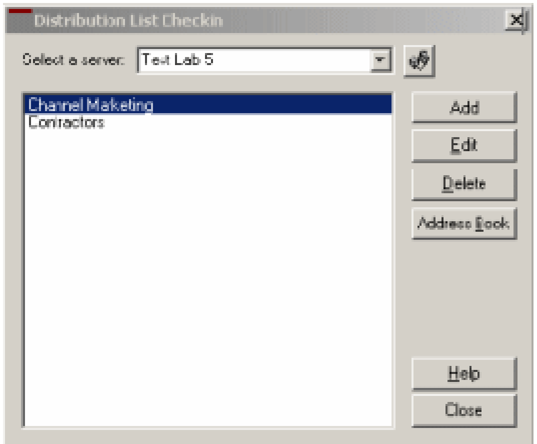
You can create a new distribution list and then check that list into the content server. You can also check into the content server a distribution list that already exists in your Microsoft Outlook Address Book.

Follow these steps to check in a distribution list:

1. Open the e-mail client (Microsoft Outlook or Lotus Notes).
2. Open the Distribution List Checkin dialog box as follows:
   - ❖ In Microsoft Outlook, click **Tools——Check In Distribution List**.
   - ❖ In Lotus Notes, click **Actions—Check In Distribution List**.

   The Distribution List Checkin dialog box appears.

Figure 4-9 Distribution List Checkin dialog



The **Address Book** button appears if you are using Microsoft Outlook.

3. Click **Add** to open the Edit Distribution List dialog box.
4. Beside **List Name**, enter the name of the new distribution list you are creating.
5. Beside **Name**, enter the person's name as you would like it to display in the distribution list.
6. Beside **Address**, enter the person's e-mail address.
7. Click **Add**.

   Repeat steps 4 to 6 for each new member you are adding to the distribution list.
8. When you finish adding the names and addresses for the distribution list, click **OK**.

   This opens the content check-in form.
9. Assign the appropriate metadata to the distribution list and click **Check In**.
10. Click **OK** to the confirmation message and then click **Close** to close the Distribution List Checkin dialog box.

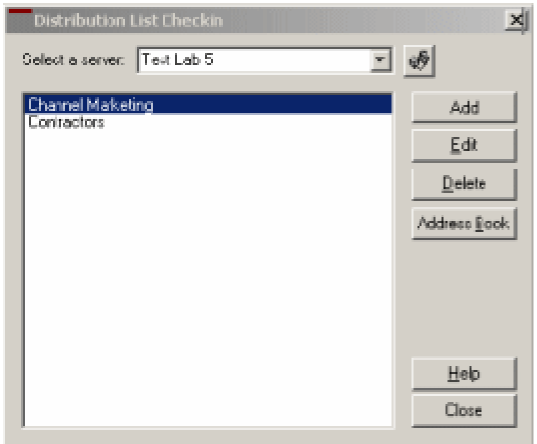
Checking In a Distribution List From Outlook Address Book

Follow these steps to check in a distribution list from a Microsoft Outlook address book:

1. Open Microsoft Outlook.
2. Click **Tools—Check In Distribution List**.

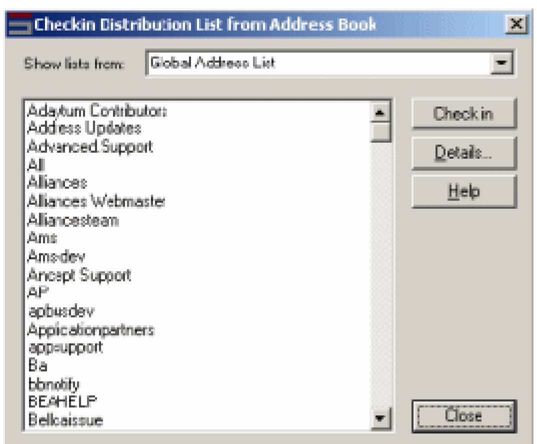
   This opens the Distribution List Checkin dialog box.

Figure 4-10 Distribution List Checkin dialog



3. Click **Address Book** to open the Checkin Distribution List from Address Book dialog box.

Figure 4-11 Address book dialog



4. From the **Show lists from** drop-down list, select the group in Outlook that contains the distribution list you are checking into the content server.

5. From that group, select the distribution list that you want to check in.

   If you wish, click **Details** to open the Properties dialog box and view properties for the distribution list, including the list of addressees.

Note: This dialog box is the same one that displays in Microsoft Outlook for viewing the details of a distribution list. To modify the properties, follow the instructions in Microsoft Outlook Help.

6. Click **Check In** and log onto the content server (if prompted).
7. On the content check-in form, set the metadata for the distribution list and click **Check In**.

Once the distribution list is checked into the content server, it displays on the Checkin Distribution List dialog box for that server.

If you use Microsoft Word as your e-mail editor in Outlook 2000 or 2002, you will not be able to check in a distribution list. To use this feature, you need to switch to Outlook's HTML or text editor.

Editing a Distribution List

Once you check a distribution list into the content server, you can modify the list by adding, changing, or removing information. Also, you can clear the information in the Name and Address field by clicking **Reset**.

Important: Changes you make to the list are reflected only in the version checked into the content server. If the list is also used in Microsoft Outlook, that version remains unedited. When you edit a distribution list that is checked into the content server, you can create a new revision or a new content item when you save the list.

This section covers the following topics:

❖ Adding a New Member to a Distribution List (page 4-23)

❖ Changing the Name or Address of a Member (page 4-25)

❖ Deleting a Member from a Distribution List (page 4-25)

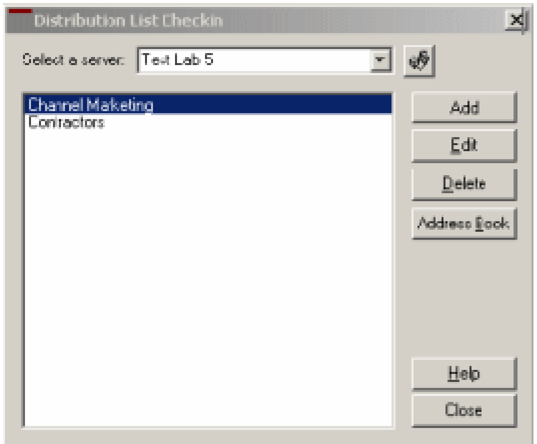
Adding a New Member to a Distribution List

Follow these steps to add a new member to a distribution list:

1. Open the e-mail client (Microsoft Outlook or Lotus Notes).
2. Open the Distribution List Checkin dialog box as follows:
   - In Microsoft Outlook, click **Tools—Check In Distribution List**.
   - In Lotus Notes, click **Actions—Check In Distribution List**.

   The Distribution List dialog is displayed.

Figure 4-12 Distribution List dialog



This dialog box includes an **Address Book** button when used in Microsoft Outlook.

3. Highlight the list that you want to change and click **Edit**.
4. In the Edit Distribution List dialog box, enter a new name in the **Name**, and **Address** fields

   When you first open this dialog box, you see the Name and Address fields already populated (with the details of the first member in the list). To add a new member, simply overwrite these values with the name and address of the new member. This will not remove the original addressee from the list.
5. Click **Add** and then click **OK** to close the Edit Distribution List dialog box.

   A message appears, prompting you to either check the distribution list in as a new content item or as a revision to the existing item.
6. To check the distribution list in as a new content item, choose **Yes**. Then, in the **New Checkin Name** dialog box, enter a new name for the distribution list and click **OK.**

   To check the distribution list in as a revision to the existing content item, choose **No**. Then, on the content check-in form, modify the metadata, if necessary, and click **Check In**.
7. Set the metadata for the distribution list on the content check-in form and click **Check In**.

See the Content Server user help for more information on the content check-in form.

Changing the Name or Address of a Member

Follow these steps to change the name or address of a member of a distribution list:

1. Open the e-mail client (Microsoft Outlook or Lotus Notes).
2. Open the Distribution List Checkin dialog box as follows:
   - ❖ In Microsoft Outlook, click **Tools—Check In Distribution List**.
   - ❖ In Lotus Notes, click **Actions—Check In Distribution List**.
3. Highlight the list that you want to change and click **Edit**.
4. In the Edit Distribution List dialog box, change the value for the **Name** and **Address** fields, if necessary.
5. Click **OK** to close the Edit Distribution List dialog box.
6. Choose **Yes** to check the distribution list in as a new content item and enter a new name for the distribution list in the **New Checkin Name** dialog box. Then click **OK.**

   Or, choose **No** to check the distribution list in as a revision to the existing content item and on the content Check In Form, modify the metadata (if necessary), and click **Check In**.
7. Set the metadata for the distribution list on the content check-in form and click **Check In**.

See the Content Server user help for more information on the content check-in form.

Deleting a Member from a Distribution List

Follow these steps to delete a member from a distribution list:

1. Open the e-mail client (Microsoft Outlook or Lotus Notes).
2. Open the Distribution List Checkin dialog box as follows:
   - ❖ In Microsoft Outlook, click **Tools—Check In Distribution List**.
   - ❖ In Lotus Notes, click **Actions—Check In Distribution List**.
3. Highlight the list that you want to change (remove a member from) and click **Edit**.
4. In the Edit Distribution List dialog box, highlight the member to delete and click **Delete**.
5. Click **OK** to close the Edit Distribution List dialog box.
6. Choose **Yes** to check the distribution list in as a new content item and enter a new name for the distribution list in the **New Checkin Name** dialog box. Then click **OK.**

Or, choose **No** to check the distribution list in as a revision to the existing content item and on the content check-in form, modify the metadata (if necessary), and click **Check In**.

7. Set the metadata for the distribution list on the content check-in form and click **Check In**.

If you use Microsoft Word as your e-mail editor in Outlook 2000 or 2002, you will not be able to check in a distribution list. To use this feature, you need to switch to Outlook's HTML or text editor.

Deleting a Distribution List

You can delete a distribution list from the content server. When you do so, all revisions of that distribution list will be removed. If the list is also used in Microsoft Outlook, it remains unchanged and is still available through Microsoft Outlook.

Follow these steps to delete a distribution list:

1. Open the e-mail client (Microsoft Outlook or Lotus Notes).
2. Open the Distribution List Checkin dialog box as follows:
   - ❖ In Microsoft Outlook, click **Tools—Check In Distribution List**.
   - ❖ In Lotus Notes, click **Actions—Check In Distribution List**.
3. Highlight the list that you want to delete and click **Delete**.

   The distribution list is removed from the content server.
4. Click **Close** to close the Distribution List Checkin dialog box.

ATTACHING CONTENT TO AN E-MAIL MESSAGE

You can attach one or more content items to an e-mail message, and those content items can originate from the content server, from your local file system, or from an offline location:

❖ Attaching Content From the Content Server (page 4-27)

❖ Attaching Content From the File System (page 4-28)

❖ Attaching Content From an Offline Location (page 4-29)

Attaching Content From the Content Server

You can attach one or more content items, or links to those content items, from the content server to an e-mail message you are sending. You can send different versions of the attachment or a link to the attachment.

Follow these steps to attach content from the content server:

1. Open the e-mail client (Microsoft Outlook or Lotus Notes).
2. Create a new e-mail message.
3. Open the Get Attachment dialog box as follows:
   - ❖ In Microsoft Outlook, click the **Check In Mail Item** button on the toolbar.
   - ❖ In Lotus Notes, click **Actions—Check In Mail Item**.
4. Click the **Server** tab, if this is not already the default view. You may be prompted to enter your login credentials first.

   The search page of the content server displays.
5. To change to a different content server, select the server from the **Server** drop-down list.

   If the server you want to use is not listed, click the Server icon () and follow the steps in Adding a Server Connection (page 4-8). (You may be prompted to enter your login credentials.)
6. From the **Action** drop-down list, select the attachment option you would like to use.

Type	Description
Attach native file	Attaches the file in its native format.
Attach native file URL	Attaches the URL to a file in its native format
Attach alternate file	Attaches the alternate file.
Attach alternate file URL	Attaches the URL to the alternate file
Attach weblayout file	Attaches the file in a web-viewable format.
Attach weblayout file URL	Attaches the URL to the file in a web-viewable format

Type	Description
Attach content information page URL	Attaches the URL to the Content Information page for that file
Attach HTML Rendition	Attaches the HTML rendition of the file

If you select a native or web-viewable file, the e-mail recipient will receive the current revision of the file at the time you selected it. If you select a URL, the most recent revision that exists in the content server always displays when the e-mail recipient clicks the link.

7. Search the content server for the desired item or items.
8. Click the selection button (

) next to the item that you want to attach to your message.

   Or, to select a particular revision of the content item, click the **Info** button () next to it. On the content information page, select the desired revision.

   To attach multiple content items from the content server, repeat steps 3 through 8 for each item.
9. You will return to the new message window in the e-mail client.

   Author the e-mail message and send it in the usual way.

If you use Microsoft Word as your e-mail editor in Outlook 2000 or 2002, you will not be able to use the Email Client Integration's attachment feature. To use this feature, you need to switch to Outlook's HTML or text editor.

Attaching Content From the File System

You can attach one or more content items from your local file system to an e-mail message you are sending. (Alternatively, you can still attach files using your e-mail client's native file attachment feature.)

Follow these steps to attach content from the file system:

1. Open the e-mail client (Microsoft Outlook or Lotus Notes).
2. Create a new e-mail message.
3. Open the Get Attachment dialog box as follows:
   - ❖ In Microsoft Outlook, click the **Get Attachment** button on the toolbar.

  - ❖ In Lotus Notes, place your cursor in the body of the message and then click **Actions—Get Attachment**.

4. Click the **Folders** tab, if this is not already the default view.
5. Use the **Look In** drop-down box to locate the folder that contains the file.
6. Select the file and click **OK**.

   You will return to the new message window in the e-mail client with the file attached.
7. Author the e-mail message and send it in the usual way.

Attaching Content From an Offline Location

You can attach one or more content items from an offline location to an e-mail message you are sending. Offline content includes:

- ❖ New files that you saved but did not check into the content server (when you closed the file)
- ❖ Read-only files that you obtained from the content server for viewing purposes
- ❖ Files checked out of the content server that you are still working on

For more information, see Chapter 3 (*Managing Content Through the Common Dialogs Interface)*.

Follow these steps to attach content from an offline location:

1. Open the e-mail client (Microsoft Outlook or Lotus Notes).
2. Create a new e-mail message.
3. Open the Get Attachment dialog box as follows:
   - ❖ In Microsoft Outlook, click the **Get Attachment** button on the toolbar.
   - ❖ In Lotus Notes, place your cursor in the body of the message and then click **Actions—Get Attachment**.
4. Click the **Offline Content** tab, if this is not already the default view.
5. Select the file and click **OK**.

   You will return to the new message window in the e-mail client with the file attached.
6. Author the e-mail message and send it in the usual way.

Appendix

A

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OVERVIEW

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Glossary

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GLOSSARY

default

A choice made by an application unless the user specifies otherwise. Applications have default settings built into them for certain values or options that are required for the program to function.

file name

The name of a content item, such as "my_content.doc." In Content Server, it is acceptable for multiple content items to have the same original file name. However, in WebDAV clients such as Windows Explorer, file names need to be unique. Because of this requirement, when working in the Content Server folder hierarchy, if you add content to a folder that already contains a content item with the same name, the content is checked in as a new revision to the existing content item.

folder

The name of a storage area on a computer's disk drive that contains a collection of content, other folders, or both.

When using Content Server's Folders functionality, you view and interact with the content server through folders. With folders you can create a hierarchical folder structure. Each folder contains the content items that have the same Collection ID value, which is assigned when you check it into the folder.

Folders component

A component that provides a hierarchical folder interface to content in Content Server. The component is required for integrating Content Server with Windows Explorer.

Folders hierarchy

The interface to the content server through Windows Explorer. When you integrate Content Server with Windows Explorer, a top-level Content Server folder is added to

Windows Explorer. When you open or expand this folder, you can view the servers that you are connected to.

Idoc script

A proprietary scripting language used to create dynamic web pages in Content Server. Idoc Script provides the ability to reference variables, conditionally include content in HTML pages, loop over results returned from queries, and more. Idoc Script is primarily used to present HTML templates. Idoc Script pages may contain a number of different file extensions (usually .idoc, .hcsp, or .hcst) depending on its use.

metadata

“Data about data.” The metadata you view for folders and content in the Content Server folder hierarchy will vary, based on what is available in the content server. Metadata you will typically use includes security group, content ID, and version number.

Project folder

A folder that may display through the Content Folders hierarchy. When you view a Projects folder in this hierarchy, the folder has additional security assigned to the content within it. Projects display when the Collaboration Manager is enabled on the content server.

server

A computer that offers services on a network.

shortcut

A type of link to an item. With Content Server’s Folders functionality, you can create a shortcut to a folder, content, a server, or the top folder level in the folders hierarchy so you can quickly access information that you use often.

system folder

You may view a different number of folders for each server through the Content Server folder hierarchy, depending on how each server you are connected to is set up. There is one top-level system folder, “Contribution Folders,” which may display.

While the folder may have been renamed, the Contribution Folder represents the content server.

In addition to the top-level system folder, you can have other top-level folders in the folders hierarchy, such as a Projects folder. The top level is set up by the system administrator. You can add new folders to a top-level folder (which become subfolders), assuming you have permissions in the content server to do so.

Each top-level folder has a unique icon, so you can easily differentiate between top-level folders, no matter how they are named.

web browser

Software that is used to request information from the Internet, interpret HTML markup, and display web pages to the user. Some commonly used web browsers include Microsoft Internet Explorer, Mozilla, and Firefox.

web browser interface

In Desktop Integration Suite documentation, this refers to the web interface of Content Server and its Folders functionality. This term is used to distinguish the interface from the Folders hierarchy, which you view through Windows Explorer.

WebDAV

An extension to the HTTP/1.1 protocol that allows clients to perform remote web content authoring operations. The WebDAV protocol is specified by RFC 2518. See the WebDAV Resources Page at http://www.webdav.org for more information.

When Content Server is integrated with Windows Explorer, Windows Explorer serves as an alternate user interface to the native files in the content repository. The same versioning and security controls apply, whether an author uses the Content Server web browser interface or the Content Server folder hierarchy.

WebDAV client

A WebDAV-compliant "client" application, such as Microsoft Word 2000 or 2002, that can send requests and receive responses by using WebDAV protocol.

WebDAV server

A server that can receive requests and send responses using the WebDAV protocol and can provide authoring and versioning capabilities. Because WebDAV requests are sent over HTTP protocol, a WebDAV server typically is built as an add-on component to a standard web server.

In Content Server, the WebDAV server is used only as an interpreter between clients and Content Server; the content server controls versioning and access to the content.

Index

A

C

D

E

F

L

M

N

O

P